Drama Directory

Your guide to European TV Drama Commissioning Editors and Buyers

2016 UPDATE

Creative Europe MEDIA

CONTENTS

This directory is an initiative of Creative Europe Desk Ireland MEDIA Offices in Dublin and Galway.

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INTRODUCTION

The European network of Creative Europe Desk MEDIA offices is delighted to publish this updated 2015 edition of the Drama Directory, a Guide to European TV Drama Commissioning Editors and Buyers.

The Guide is intended as a tool for TV producers in search of co-financing or TV sales for their Drama projects. In particular we hope it will be of assistance to potential applicants of the Creative Europe MEDIA Television Programming support scheme which requires a minimum of three pre-sales to European Broadcasters and a clear distribution strategy for circulation in Europe and beyond.

The production of this Drama Directory is a true European collaboration with each Creative Europe Desk providing the information on the TV Market and the TV Channels in its own territory.

We would also like to take this opportunity to thank the participating Broadcasters for their generosity in providing the information contained in this Directory and the European Audiovisual Observatory for allowing us to use information from the MAVISE database.

We hope the Drama Directory will continue to be a useful resource for Television Drama Producers and Broadcasters alike. We welcome your feedback and suggestions for future editions.

THE CREATIVE EUROPE DESKS – MEDIA OFFICES

Madame Nobel (c) 2014 Monafilm. Supported by Creative Europe-MEDIA, Funding Scheme: TV Programming. Directed by Urs Egger.

AUSTRIA

The public service broadcaster´s channels ORF1 and ORF2 had a combined average audience market share of 35.3%. In 2011, the channel "ORFIII Kultur und Information" (specialised on culture, history, Europe) was introduced, as well as the sports-channel ORF Sport +. The main German private channels (RTL, Sat1 Österreich, ProSieben Austria und Vox) had a combined market share of 20.6%. German public service channels had a combined audience market share of around 13%. The main private Austrian channel is ATV with a market share of 3.3%, followed by Puls 4 (3%). (Audience data source: *Eurodata TV Worldwide / AGTT / GfK Teletest*).

Half of the 3,55 million TV households receive Satellite television, followed by 44% connected to cable TV, only half of which is digitised. IPTV and DVB-T households each make up 6% of the total number of TV households. The degree of digitisation in December 2012 was 77%. Digital terrestrial television provides the following national channels: ATV, ATV2, ORF1, ORF2, ORFIII, ORF Sport +, PULS 4, Red Bull TV, Servus TV and 3sat. There are 18 regional and local stations. The new pay-DTT platform Simpli TV marked the introduction of DVB-T2 technology in Austria (2013). The biggest cable operator is UPC, with 535 000 subscribers. Digital satellite packages are provided by ORF, Sky Österreich, Austria Sat, HD Austria. IPTV platforms are A1 TV in Vienna by A1 Telekom Austria AG (210 000 subscribers) and the platform TV-Box operated by MyPhone Austria GmbH.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

ORF

ORF is an independent public service broadcasting corporation. It has four national TV channels: ORF1, ORF 2, ORF III, ORF Sport+, four national and nine regional radio stations, all financed by license fees and advertising. The TV channels are complementary and are transmitted by terrestrial network as well as satellite in collaboration with 3sat.

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The Spiral. Produced by Caviar, Belgium. Developed with the support of the MEDIA Interactive support scheme.

BELGIUM

The three Communities (Flemish, French and German speaking) each have responsibility for audiovisual communication and constitute separate markets, the common feature being the fact that all three markets have been extensively cabled for three decades and are thus able to receive the channels of neighbouring countries. They each have their own systems of regulating the audiovisual media and their own public service broadcasters, namely the VRT, the RTBF and the BRF respectively.

The main players in the Flemish Community are VRT, which operates the public channels Één, Canvas and Ketnet/OP12 , and Medialaan (Vlaamse Media Maatschappij), which runs the channels VTM, 2BE, Anne, Jim, vtmKzoom and Vitaya. Één (VRT) continues to dominate the market, with a steadily rising daily audience share of 31% in 2013, a slight decrease compared to 2010 (33%) which reached 33% in 2010 (compared with 28.7% in 2006). Behind Één in audience terms are the channel VTM (17.4% in 2013) and the second public channel Canvas (children's programmes during the day sports and cultural programmes in the evening), followed by Vier, 2BE and Vijf. The rest of the market is split between a number of special interest channels set up in the Flemish Community as well as French and Dutch language channels.

In the French Community (which now refers to itself as the "Federation Wallonie- Bruxelles"), the main operators of television channels are, apart from RTBF (La Une, La Deux and La Trois), the RTL group, with its three channels RTL-TVI, Club RTL and Plug RTL that target Belgium but operate under Luxembourg law, and the French group AB (AB3, AB4 and AB Shopping). RTBFs market share rose slightly in 2012 (20.9% compared with 20.5% in 2011). RTL-TVI continues to dominate the market with a 20.1% daily audience share in 2012 (19.2% in 2008) and a prime time market share of 28%. The second most important Belgian channel is La Une (RTBF), with a 14.6% market share. La Deux once again exceeded the 5% mark (5.4% compared with 4.8% in 2011). The other Belgian channels have a combined share of less than 5% (Club RTL, La Deux, AB3, etc) and a significant number of viewers still turn to the French channels, which command about a third of the audience share.

In the German speaking Community, the majority of the population (about 74 000 inhabitants) choose mainly to watch the German television channels.

Almost 100% of Belgian households subscribe to pay TV cable TV, mainly due to the extent of the countrys cable network. The country's primary cable operator, Telenet (58% of which is under the ownership of Liberty Global since January 2013), claims more than 2.1 million subscribers to its range of channels. The other cable operators are Brutélé, Tecteo (under the VOO brand) and Numericable/Coditel. The market has undergone significant concentration in the last four years, with the number of cable operators falling from 19 in 2006 to just 6 in 2012. Since January 2013, the service of AIESH has been replaced by that of Numericable. In July 2011, the IBPT (the federal telecommunications services authority) adopted a plan to open up the cable network. This states that cable operators will in future have to enable any interested parties to make a bid to offer television services or high speed Internet services using the networks of the major cable operators.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

BTV (BELGIUM TELEVISION SA)

Created in 2011, BTV operates 2 generalist channels totalling a 5.1% market share in the South of Belgium. AB3 is devoted to fiction (67%) and entertainment for an audience aged 15-34 year old. AB4 focus on fiction (59%) like cult movies and classical series towards an older audience (35+).

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Owned by cable operator Tecteo, BeTV offers a digital package of thematic channels (pay TV), Be Premium, including cinema (Be1, Be Ciné), series (Be Series) and sports (Be Sport 1, 2 and 3). It also distributes specialized services (Be Enfant, Be Documentaires, Be Charme) as well as a VoD catalogue. 61% of the programming on Be1 is made of films. Most of its acquisitions come from Canal + France.

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RTL-TVI – CLUB RTL – PLUG TV

RTL, a subsidiary of CLT-UFA/RTL Group, operates 3 channels in French-speaking Belgium with a 30% market share. RTL-TVi is a generalist channel combining news programmes, entertainment, commercial films and series (mainly American). Until recently, Club RTL was focused on niche programme for kids, series and films but now it plans to go more mainstream. Plug addresses young adults with series, cult movies, reality shows and music programmes.

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RTBF, the public broadcaster in the French-speaking community, operates 3 channels: la Une, la Deux, la Trois. La Une is focused on information, entertainment and generalist programmes. La Deux is more oriented towards series and sports. La Trois is a children's channel in the daytime and a more cultural one (documentaries & films in original version) in the evening.

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VRT ÉÉN

VRT is Belgium's Dutch-language public broadcaster of the Flemish community in Belgium. VRT consists of the family entertainment channel Één, the youth channel Ketnet and Canvas, which is an informative and cultural channel with a strong documentary profile.

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SBS BELGIUM

VIER is a private tv-channel with national coverage in Belgium, focusing on the Flemish (Dutch speaking) community. The target group is VVA 18-54. VIER offers free tv and broadcasts 168 hours per week. VIJF is, like VIER, also a part of SBS Belgium and is a lifestyle free tv channel focusing on women between 20 and 49 years old. SBS Belgium is part of the bigger De Vijver Media structure.

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BELGIUM

BULGARIA

In Bulgaria the private channel bTV (Central European Media Enterprises) dominates the market and had a daily audience market share of 36.3% in 2012. BNT, the public broadcaster now has four television channels and a total audience share of 8.5% (less than half the share it had in 2006). The other major commercial player is the Modern Times Group with Nova TV (14.9%). (Audience data source: Eurodata TV Worldwide / TNS TV Plan).

Approximately 30% of Bulgarian homes receive cable television with over 600 cable network operators. In 2010, the private equity company EQT V took over two major operators: Cabletel and Eurocom establishing a new service called Blizoo. The service had 440 000 subscribers in 2013. In 2010 Telekom Austria (via Mobiltel) bought into the Bulgarian market (acquiring Megalan and Spectrum).

The Bulgarian satellite market has witnessed several major changes in the last year. Satellite BG closed down in June 2013 due to the economic crisis. The service had about 50 000 customers and they were recommended by Satellite BG to move to Vivacom. The main players in the market are Bulsatcom and Vivacom TV (from Telecom operator Vivacom). A new service was launched in 2013 by Neterra and Telenor called W1. There are also at least 15 IPTV services available, mostly provided by local ISPs, with the most important provided by Mobiltel (Telekom Austria).

Regarding DTT in Bulgaria there were tenders in 2009 and 2010. Two companies were selected: Towercom (Slovak Republic) to operate two nation-wide DTT multiplexes; and Hannu Pro (Latvia) to operate three nation-wide DTT multiplexes and the public service multiplex. Complaints against this decision led to the opening of infringement proceedings by the European Commission regarding the tender process including the restrictions on who could enter the tender. The two operators have continued the development of DTT services. Switch-off was reported to have taken place in September 2013. However, such a large number of homes were unprepared and left without television signals that the switch-off was delayed until November 2013. Low income homes were provided with vouchers to help in the purchase of DTT equipment.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

TV7

TV7 is a Bulgarian polythematic television channel with a national coverage. It is the main channel in the group of channels TV7, NEWS7 and SUPER7 which starts its broadcasting at the end of 2005. Since 2013 the program of the television is being processed digitally on the territory of the whole country while reaching 96.2% of population coverage.

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bTV

bTV is the first private national TV station in Bulgaria.
bTV's program was broadcast for the first time on June 1st 2000, those braking the monopoly of the public national TV station and changing entirely the media environment in Bulgaria. For 12 years bTV firmly established itself as the most watched TV channel in Bulgaia with nearly 40% share of all viewers and with leading positions on the advertising market.

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NOVA TV

In 2008 NOVA TV became part of Modern Times Group (MTG). At the beginning 2011 NOVA, DIEMA, DIEMA 2 и DIEMA FAMILY, NOVA SPORT, TV 1000 Balkan, Viasat History, Viasat Explore и Viasat Nature, as well as EVA magazine became part of the established Nova Broadcasting Group. The expansion continues in 2013, when the company became owner of 70 % of Darik Net and all web sites of Darik web together with the biggest digital media company in the country Netinfo.

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BNT

The Bulgarian National Television (BNT) was founded in 1959 and it was the first television service to broadcast on the territory of Bulgaria. As a public service broadcaster, the main purpose of BNT is to deliver a broad range of news and programming that keeps its audience informed about important issues and events in the areas of politics, economics, business, culture, science and education. BNT operates four regional production centres in the cities of Blagoevgard, Varna, Plovdiv and Rousse.In 1999, BNT launched the satellite channel 'TV Bulgaria' designed mainly for Bulgarians living abroad. At the end of 2010, the channel was renamed 'BNT World'.Channel BNT2 was launched in 2011. It pooled together the programming of the four regional centres. It is available free-to-air in the major cities in Bulgaria.BNT gives its viewers the benefit of emerging communications technologies and services and it was one of the earliest Bulgarian Media on the 'World Wide Web'.

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CYPRUS

The Cypriot public service broadcaster CYBC continues to play an important role in the market with four channels: RIK1, RIK2, RIK HD and RIK Sat. These had a combined daily audience share of 17.4% in 2012, a slight increase from the year before. The national private channels are very strong with the most important being Sigma (18,4%), ANT1 (16.2%) and Mega (14.4%), followed by Plus TV (3,9%).

(Audience data source : Eurodata TV Worldwide / AGB Nielsen Media Research Cyprus).

Several channels are the Cyprus versions of major Greek commercial channels including ANT1, Mega, and the new sister channel of a Greek commercial station which was launched in 2011 (Mad Cyprus). Cyprus is also home to a number of Russian language channels that target Russia and the Baltic states.

Analogue terrestrial signals were switched off on 1 July 2011, after a short transitional period. The network was launched in spring 2010 with the multiplex operated by the public broadcaster and composed of public channels. At the beginning of 2011, the private consortium Velister Ltd (consisting of six private broadcasters and the distributors Primetel and Cablenet) launched a second multiplex, dedicated to private channels. In 2013, Velister was broadcasting nine free channels and a pay- DTT package composed of six channels and produced by LTV (Lumiere TV).

The transition to DTT had a strong impact on the local television landscape in Cyprus. In the absence of a local DTT network, several local stations have begun to broadcast nationally (Extra TV Limasol and Capital TV) in some cases with a revised programme schedule, while others have had to cease broadcasting either temporarily or permanently.

The only satellite package available in Cyprus is Nova, operated by the Greek firm Multichoice Hellas (subsidiary of Forthnet). Only around 5 000 homes paid for satellite subscription services in 2012. The main cable operator is Cablenet and the company has faced competition since 2010 with the launch of two cable TV packages by LTV (Lumiere TV): LTV Cable and LTV3Play. Approximately 12% of homes in Cyprus subscribe to cable packages. Cablenet claimed to have 30 000 subscribers in 2012. Two IPTV services are available: from Cytavision and Primetel. Almost 20% of homes opted for IPTV services in 2012.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

CYPRUS BROADCASTING, CORPORATION (CYBC)

CyBC is a generalist channel broadcast by the Cyprus Broadcasting Corporation. It has national coverage and is broadcast in Greek. It is a free HD public channel, broadcast over the DTT network.

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ANT1 TV

Launched in 1993, Ant1 TV is an analogue terrestrial generalist channel with national coverage, broadcast in Modern Greek. The channel is free and active 168 hours per week. Ant1 TV is a sister channel of ANT1 TV (Greece). It was the first private channel to be launched after Cyprus broadcasting liberalisation.

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SIGMA TV

Sigma TV is the main private TV channel in Cyprus and main TV channel in Cyprus in terms of audience. SIGMA has a programmes deal with the Greek channel Star Channel. Sigma targets mainly young urban adults. SIGMA prime time schedule is composed of local (40%) US (25%), mainland Greek (15%) and other (20%) programming. It has free national coverage, active 168 hours a week and is broadcast in Modern Greek.

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CZECH REPUBLIC

In the Czech Republic, the television market continues to be dominated by the private channel Nova TV (Central European Media Enterprises), which in 2014 had a market share of 31.98 %. The public service broadcaster Czech Television, had a total market share of 29.86 % thanks to the growth of CT24, CT4 and CT :D / CT art. In third place is the private channel Prima TV (Modern Times Group), which had a share in 2014 of 21.54 %. (Audience data source: ATO)

All the main operators have launched additional channels over the past 10 years. The Nova TV family channels include Nova Sport and Nova Cinema and the male oriented channel Fanda launched in 2012. The public service broadcaster has a sport and a news channel (CT 4 Sport and CT 24) and a channel split during the day between programme for children and art programme (CT :D / CT art). Prima TV also has two entertainment channels: Prima Cool targeting men, and Prima Love, which targets women.

Analogue terrestrial television was switched off in June 2012. Digital Terrestrial Television is the most important distribution platform in the Czech Republic serving more than 34% of homes in 2013. IPTV has taken off in the Czech Republic with 5 big competing offers.

On 6 September 2011 the Parliament of the Czech Republic adopted amendments to audiovisual legislation that concern advertising and teleshopping in public television. From January 2012 advertising was removed from the channels CT1 and CT24 (News). The other channels will continue to have advertising but the time allocated to advertising on CT2 and CT4 should not exceed 0,5% of the daily broadcasting time.

SOURCE: MAVISE Database and ATO (Association of Television Organizations, Czech Republic)

ČESKÁ TELEVIZE (CZECH TELEVISION)

Česká televize is Czech public service broadcaster. It is financed mostly from television licence fees, partly from business activities. It broadcasts on six channels: ČT1, ČT2,ČT24 (news channel), ČT sport (sport channel) and the newly launched ČT :D (children channel) and ČT Art (culture channel). While ČT1 is a family-oriented channel showing original Czech movies, series, entertainment and lifestyle, ČT2 offers documentaries, nature-oriented shows and foreign films and series. ČT :D is a children's educational channel, launched 31. 8. 2013, which broadcasts from 6am until 8pm. ČT art is a channel focusing on culture, theatre, operas, music, art films, launched 31. 8. 2013, which broadcasts from 8pm until late night.

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TV NOVA

CET 21 is a private broadcaster which broadcasts on several channels: Nova (private channel with the biggest market share), Nova Cinema, Nova Sport (sport channel), MTV Czech Republic, Fanda, Smíchov and Telka. The programming of Nova is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Nova Cinema offers mostly feature films and TV series.

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PRIMA TV

FTV Prima is a private broadcaster which broadcasts on four channels, Prima, Prima COOL, Prima Love and Prima ZOOM. Prima's programming is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Prima COOL is an entertainment channel broadcasting mainly American films, TV series, sport and entertainment programmes. Prima Love is a channel targeted at women, broadcasting films, TV series and talk shows. Prima ZOOM is a new channel, launched 1. 2. 2013, broadcasting mainly foreign documentaries.

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HBO CZECH REPUBLIC

HBO Czech Republic is the Czech subsidiary of Home Box Office (HBO). It is transmitted by cable and satellite networks and it broadcasts mostly feature films, TV series and documentaries. It operates several channels: HBO, HBO2, HBO Comedy, Cinemax and Cinemax2.

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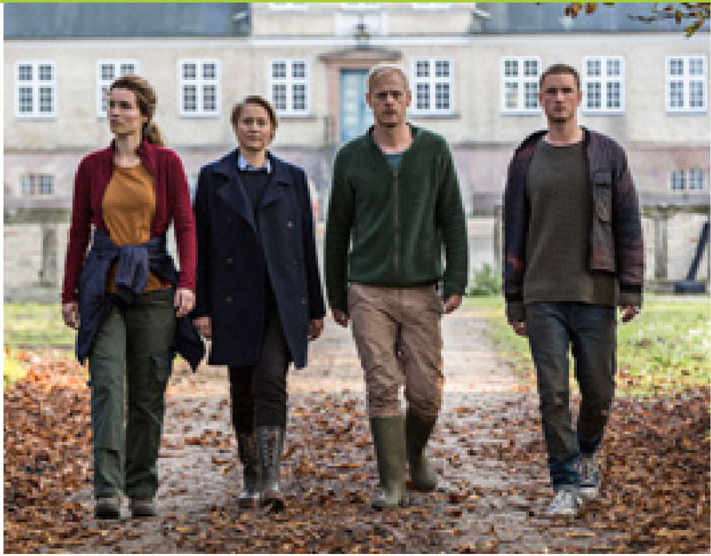

The Legacy II (Photo: Per Arnesen). Produced by DR Fiction

Norskov (Photo: Adam Wallensten). Produced by SF FILM PRODUCTION for TV 2 Danmark A/S

DENMARK

Denmark is the only European market in which public channels, operated by the two public broadcasters, DR and TV 2, still attract more than half of average daily audiences. The TV 2 channel continues to dominate the market (23.5% of daily audiences in 2014), followed by DR1 (22.4%). The two main public channels therefore account for 45.9 % of average daily audiences in 2014. Because of the creation of various special-interest channels, the entire public owned channels saw their total audience grow from 65.6% in 2010 to 69% in 2014. The most popular private channel is TV3 (Swedish MTG Group), with a daily market share of 4.5%. The other main private channels are Kanal 5 (Discovery Networks Denmark, 3.5% daily audience share) and TV3+ (MTG Group), whose daily audience share was 2.8% in 2014. (Audience Data Source: TNS Gallup – TV-Meter).

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

DR TV

DR (Danish Broadcasting Corporation) is Denmark's oldest and largest electronic media enterprise. The corporation was founded in 1925 as a public service organization and the TV channel in 1951. DR does not possess any RTB license but has signed a public service contract with the Ministry of Culture. The channel is completely financed by public revenues (there are no advertising revenues). DR TV comprises two channels, DR1 and DR2 - and four new channels from November 2009: DR K (Culture, history, music), DR Ramasjang and DR Ultra (Children's programming) and DR3 (Youth). Over the years DR has built up a strong fiction brand, especially on Sunday evenings at 20h. DR has produced a number of award winning TV series, such as The Legacy (2014-2015), The Bridge (2011, 2013), Government (2010-2013), The Killing (2007-2012), The Protectors (2009), Unit One (2000-2001), Nikolaj & Julie (2003), The Eagle (2005) and Young Andersen (2005).

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TV2

TV 2 DANMARK A/S is owned by the Danish state and the Public Service channel TV 2 is operated on a commercial basis. Until 2004, TV 2's main channel received a smaller share of the license fees. Since 2012, the main channel TV 2 has been partially funded by subscription. TV 2's overall share (20-60) is 24.1% and the commercial share (20-60) is 38.9% (2014). TV 2 has five subsidiary stations known as TV 2 ZULU, targeted at youth, TV 2 CHARLIE, oriented towards older audiences, TV 2 FRI (leisure channel), TV 2 NEWS, TV 2 SPORT, as well as the on-demand service TV 2 PLAY. In recent years TV 2 has aired a number of successful Danish TV fiction series, such as Anna Pihl (2006-2008), Park Road (2009-2010), Dicte (2013-2014), The Seaside Hotel (2013-2015), RITA (2011-2015) and Norskov (fall 2015) (all MEDIA supported).

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TV3 DENMARK

TV3 is one of the channels owned by the Viasat Corporation. They are broadcasting from the UK. There are a number of sister channels like TV3+, TV3Puls, TV3 Sport 1, TV3 Sport 2 and more. The last few years TV3 has started to include Danish TV fiction in their schedule and have had success with co-producing fiction series such as Lullu – The Bankrobber's Wife (2009).

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DISCOVERY NETWORKS DENMARK

Discovery Networks Denmark is part of the Northern European branch of the global Discovery Networks International. The Northern European region includes Ireland, Iceland, Sweden, Norway, Finland, Denmark, the Benelux and the UK and serves 18 countries, comprises 28 channel brands and reaches 69 million viewers monthly. Discovery Networks Denmark comprises 12 TV channels: Kanal 4, Kanal 5, 6'eren, ID - Investigation Discovery, Eurosport, Eurosport Danmark, Canal 9, Discovery Channel, TLC, Animal Planet, Discovery World, Discovery Science and the streaming service Dplay. Recently Discovery Networks Denmark has co-produced the fantasy series Heartless (2014-2015) airing on the main channel Kanal 5.

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ESTONIA

Estonia's public service broadcaster (Eesti Rahvusringhääling, ERR) operates three free-to-air advertising free television channels: ETV, ETV2 and ETV+. The new channel ETV+ focuses on Russian speaking audiences and involves different cross-media angles giving the viewers a possibility to participate in various discussions and debates. During 2013, ERR television channel ETV and ETV 2 reached in total 17,7%, market share, but still gave away by 0,1% it's leader position to Kanal 2 and it's sister channels Kanal 11 and Kanal 12. Kanal 2 AS, the owner and operator of all these three commercial TV-channels belongs to Eesti Meedia AS. After management buy out in the end of 2013 from Norweigan Schibsted ASA belongs Eesti Meedia AS 100% to Estonian capital. Other main private channels on the market are TV3, TV6, 3+ and other Viasat platform channels all owned by the Swedish group MTG, and Russian language channels such as PBK, RTR Planeta and Ren TV. (Audience data source: Eurodata TV Worldwide / TNS Emor).

Cable is still the main distribution platform ahead of IPTV and DTT and satellite. The number of cable operators increased to twelve in 2011 and is dominated by three main players (Starman, STV and Telset). Starman, which is also the only pay-DTT distributor, was acquired during 2013 by Swedish group East Capital Explorer. Just a few players operate on the Estonian TV market, as there are only one pay-DTT distributor (Starman), one satellite television packager (Viasat [MTG Group]) and one IPTV provider (Elion [TeliaSonera Group]).

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

ESTONIAN PUBLIC BROADCASTING

Estonian Public Broadcasting has two TV channels (ETV and ETV2) and five radio stations. ETV is Estonia's biggest public service TV channel. It offers programming to all age groups viewers including a daily evening news show; education, science, culture, lifestyle, current affairs and entertainment programs and sports coverage. ETV2 – the programming consists of outstanding cultural and educational broadcasts, documentaries, TV shows and films. It has a special daily children's slot and daily news broadcast in Russian.

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KANAL 2

The group consists of Kanal2, Kanal 11 and Kanal 12. Kanal 2 programmes mainly entertainment and local series. Kanal 11 has a set target group of modern women. Kanal 12 is more action and sports oriented, with the target group set as men.

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TV3

One of the channels owned by the Viasat Corporation. The group also includes sister channels TV6 and 3+. The programming is mainly entertainment with local productions and also acquisitions.

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Mustat lesket (Black Widows), © Moskito Television/Else Kyhälä

Tellus, 2014 – Producion Company: YLE, Finnish Broadcasting Company

FINLAND

Finland switched to Digital Video Broadcasting (DVB) in 2007 first in Europe. Next transition to high-definition technology (DVB-T2 & MPEG4) will mean parallel SD and HD-distribution for a long time and tie up resources. Finland´s national public service broadcasting company YLE´s SD broadcasts may continue as long as until 2026.

All media companies in Finland are developing increasingly interactive online and mobile services. Mobile use of media content is increasing. The media sector in Finland is undergoing the global transformation. Digitisation has changed production, distribution and reception significantly. Global and Nordic service providers, such as Netflix, HBO Viaplay and Filmnet have entered the fee-based subscription video service market.

However these changes have not radically altered the balance in the broadcasting market, where the main players remain Finland´s national public service broadcasting company YLE (YLE TV1, YLE TV2, YLE Teema and Swedish-language channel YLE FEM), MTV (MTV3, Sub, AVA + pay-channels) owned by Bonnier Group and the Finnish private media group Nelonen Media (Nelonen, Jim, Liv + pay-channels) owned by Sanoma Entertainment Finland Ltd.

In 2013 YLE´s market share of daily television viewing was 41,9 %. YLE TV1 was the most popular TV channel in Finland (market share 26%). The second popular television channel was MTV3, its market share was 19 %. Daily television viewing in Finland in 2013, including children aged four and over, was 3 h 2 min (2012: 2 h 55 min). (Source: Finnpanel). Pay-TV share in Finland is around 600 000 households. It is around 25 % of all households in 2013. (Source: Ficom)

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

MTV

MTV has 6 TV channels: MTV3, Sub, AVA and the MTV Channel Package, which is a pay-TV package comprising MTV MAX, MTV Fakta, MTV Leffa, MTV Juniori, MTV Sport 1, MTV Sport 2. MTV represents C More pay-TV services in Finland. MTV (MTV Oy) is owned by Nordic Broadcasting Oy, which is owned by the Swedish publisher Bonnier AB. The MTV Channel package was launched in November 2006. MTV has been representing the C More pay-TV Services since 2009. MTV also offers a AVOD+SVOD service called Katsomo.

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NELONEN MEDIA / SANOMA MEDIA FINLAND LTD.

Nelonen Media is a strongly developing broadcasting group reaching more than 90 % of the Finns. We bring our customers quality entertainment through diverse media portfolio. Nelonen Media operates four nationwide free-to-air TV channels, five pay TV channels, four nationwide radio channels, two regional radio channels, free-of-charge VOD channel, and a SVOD service. Each channel and station have their own website which offer additional, program-related content. Nelonen Media is part of Sanoma Media Finland. Sanoma is amongst the largest media and learning companies in Europe. Our key markets are Finland, The Netherlands, Belgium and Central & Eastern Europe.

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THE FINNISH BROADCASTING COMPANY (YLE)

Yle is Finland´s national public service broadcasting company. Yle operates four national television channels (Yle TV1, YLE TV2, YLE Teema, Yle Fem) and six radio channels and services complemented by 25 regional radio programmes. Yle also offers online television and radio supply Yle Areena

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FINLAND

The Rebound 2 (*Les revenants*, saison 2) which receive MEDIA TV Programming support in 2014.

FRANCE

In the French market, TF1 remains the most popular channel with a daily audience share of 22.7% in 2012 but that share has been steadily falling (32% in 2005). The two public channels France 2 (14.9%) and France 3 (9.7%) stabilised their audience market share in 2012. Both in 2012 and 2011, the daily audience market share (11.2%) of the private channel M6 was even higher than that of France 3. TMC has confirmed its position as the fifth most-watched channel (3.6%), ahead of France 5 (3.5%). By March 2012 more than 97% of French television homes were digital. (Audience data source: Eurodata TV Worldwide / Médiamétrie / Médiamat).

The French audiovisual landscape is likely to experience a new major development with the expected arrival in September 2014 of Netflix, which will probably be a major competitor for Canal+. In January 2014, the Presidents of the three main private groups, TF1, M6 and Canal+, wrote a joint letter to the Minister of Culture requesting the urgent reform of audiovisual policy. One of the key issues of the debate is the revision of the release windows for film distribution.

Fiction is the first genre on the national free channels (TF1, France 2, France 3, France 5, M6, Arte, D8, W9, TMC, NT1, NRJ12, France 4, D17 and Gulli), representing 23% of the offer (28 100 hours) in 2013.
Historical national channels (TF1, France 2, France 3, Canal+, M6 and Arte) remain the major financers for French fictions. In 2013, they offered 851 nights (38,9%) of fiction among which a greater part of drama series (+41 nights) while one-off fictions works lost 12 nights.
For the first time in 5 years, American fiction is decreasing (-15 nights compared to 2012) while European fiction works (beside french programs) is in constant growth (+22 nights).

SOURCES: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.
CNC annual report (2013)

ARTE FRANCE

ARTE is the French-German public television channel. Founded in 1991, it was given the mission of providing cultural programming that promotes unity and understanding among European nations. The channel is non-commercial and broadcasts without advertising. Financial support is provided through a television and radio licence fee in both countries. The channel is pioneering the marriage of television, internet and mobile networks as it continues to inspire viewers to think, explore and discover. ARTE FRANCE is the French partner in ARTE, providing 50% orf the programming.

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ARTE GEIE

AARTE GEIE is a public television broadcaster. The ARTE Group is composed of three entities: the headquarters in Strasbourg (ARTE GEIE) and two Members responsible for programme production and delivery, which are ARTE France in Paris (ARTE FRANCE (S.E.P.T.)) and ARTE Deutschland TV GmbH in Baden-Baden (ARTE DEUTSCHLAND TV GMBH).

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CANAL J

Canal J is a Children's (4–14) entertainment channel. Magazines, fi ction, cartoons, etc.

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CANAL +

As a long-established partner to the French film industry, c+ screens up to 500 feature films per year, and covers the big events in the filmmaking calendar, in particular the Cannes Festival and the César and Academy Awards ceremonies. C+ offers its subscribers popular sports competitions (top domestic division, champions League…) To complement its bouquet of films and sports, c+ pursues an ambitious production policy under the banner CRÉATION ORIGINALE ("Original Programming"), driven by first-run TV drama and miniseries, hallmarked by daring and innovative screenwriting: SPIRAL, THE RETURNED, SPOTLESS, BRAQUO, LE BUREAU DES LÉGENDES and VERSAILLES. C+ brings viewers a range of international TV shows, featuring some of the most innovative and popular series at a global level, including HOUSE OF CARDS, HOMELAND, GOMORRA, THE AMERICANS and THE AFFAIR.

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National public service broadcaster with 13 regional units. The regions produce and co-produce both regional and national programmes.

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FRANCE 4

France 4 is part of France Télévisions, the French public national television broadcaster. Previously named "Festival" (till 2005), and specialising in theatre, opera and French-language, and other European-originated drama, France 4 is now a channel for young adults. The channel has been recently re-positioned, with children being the target audience for daytime (6.30 a.m. to 6.30 p.m.), while the evening programmes should reach young people born after 2000 and young adults. France 4 also hosts a platform for creative web content : Studio 4.0. www.france4.fr/studio-4-0/).

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LAGARDÈRE ACTIVE (CANAL J, GULLI, FILLE TV, TIJI)

Entertainment channel targeting female young adults (20 to 30 years old). Programming is composed mainly with TV fictions and magazines. The channel replaced Filles TV in October 2009, which was launched in 2004, targeting 11 to 17 year old girls.

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M6

Second free-to-air commercial generalist channel in France. 48,6% owned by RTL Group.

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RTL9 (FRANCE)

RTL9 is broadcast via cable and satellite in France, and has also long been broadcast on the analogue terrestrial network in Lorraine (French region located near the Grand Duchy of Luxembourg) and in the Grand Duchy of Luxembourg (but analogue transmissions were shut down in July 2010). RTL9 is jointly owned by Groupe AB and by CLT-UFA.

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SÉRIE CLUB

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TF1

TF1 is a national French TV channel, controlled by TF1 Group, whose major share-holder is Bouygues. TF1's average market share of 24% makes it the most popular domestic network. Flagship shows include Star Academy (Endemol's international competitor to the X Factor franchise), CSI and House, M.D. TF1 originally stood for Télévision Française 1 (French Television 1). Since its privatisation in 1987, the abbreviation is no longer expanded, so as to avoid confusion with the Entertainment channel targeting young adults. Jointly owned by the two main French commercial broadcasters (TF1 and M6).

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TF1 INTERNATIONAL

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TV5

Number 1 French-language channel worldwide, reaching 120 million homes across the 5 continents.

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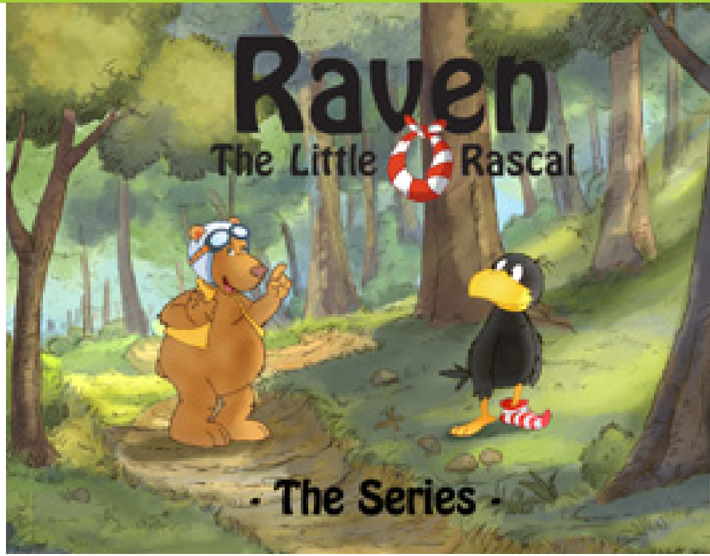
FRANCE

Falciani's Tax Bomb, 2014 – Production Company: gebrueder beetz filmproduktion (supported by the Creative Europe MEDIA TV Programming scheme, 120.000 Euro)



Raven, the Little Rascal – The Series, 2015 – Production Company: Akkord Film Produktion GmbH (supported by the Creative Europe MEDIA TV Programming scheme, 500.000 Euro)

GERMANY

The television market in Germany is one of the largest in Europe and is also very competitive. In 2014, of the country's more than 38 million TV households an equal number (46%) received programmes by cable and satellite, 10% via DTT and about 5% via IPTV. As of 2014, nearly 84% of households have access to digital television.

In 2014 the two national public service channels (ARD and ZDF) have had a combined market share of 25,8% (compared to 24.9% in 2012). With a share of 13,3%, ZDF solidified its position ahead of ARD (12.5%) and RTL (10,3%) on the scale of popularity.

Cable and satellite distribution remain the most commonly used delivery platforms. Since 2009, the cable digitisation rate has doubled, stopping at about 63%, compared to 30,9%)

Public broadcasters ZDF and ARD have decided to end a joint project aimed at creating a shared video-on-demand platform. As such, Germany's Gold will not be launched because the federal cartel office, Bundeskartellamt, has turned down the applications for failing to comply with anti-trust law.

Due in part to the broadcasting system being publicly funded, pay-TV does not have a long tradition in comparison to other countries. The acquisition of Germany's pay-TV operator Premiere AG by News Corporation (News Corp) in June 2008 and subsequent rebranding as Sky Deutschland Fernsehen GmbH & Co. KG was a step towards a more prominent position within the German market. As of 2014, the Sky Deutschland has gathered over 4,3 subscribers (in Germany and Austria).

SOURCE: Data sources: AGF / GfK / Die Medienanstalten

ARD – DAS ERSTE / DEGETO

ARD (full name: Arbeitsgemeinschaft der öffentlich-rechtlichen Rundfunkanstalten der Bundesrepublik Deutschland – Consortium of public broadcasters in Germany) is a joint organization of Germany's regional public-service broadcasters. Together with ZDF, ARD is running the children's programme channel K.I.K.A., an „event" / current affairs and documentary channel PHOENIX and together with the French TV production house ARTE France, the European cultural programme ARTE. 3sat is jointly run by ZDF, SRG, SSR ideé suisse and ARD. Within the programme ARD Digital, ARD broadcasts the additional programmes EinsExtra, EinsPlus and EinsFestival.

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ZDF – ZWEITES DEUTSCHES FERNSEHEN

Zweites Deutsches Fernsehen (English: "ZDF German Television"), ZDF, is a public service German television broadcaster based in Mainz (Rhineland-Palatinate). It is run as an independent non-profit institution, which was founded by all federal states of Germany (Bundeslander). ZDF is financed by television licence fees and advertising revenues. ZDF is a partner in the channels Arte and 3sat and it runs the digital channel ZDFneo (among others), all the mentioned channels schedule TV drama.

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BR – BAYERISCHER RUNDFUNK

Bayerischer Rundfunk is Bavaria's public broadcasting service with two television stations (BR and BR Alpha) belonging to the ARD network of regional public broadcasters. As part of the ARD public network BR has acquired a reputation for feature films and high-quality documentaries and delivers programming that provides information, gives advice and entertains, and also accommodates the interests of minority groups.

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HR – HESSISCHER RUNDFUNK

The HR is a public broadcaster based in Frankfurt. Belonging to the ARD-consortium of public broadcasting stations, the hr contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes.

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GERMANY

KIKA

Childrens television channel operated jointly by ARD network and ZDF, series, feature films, magazines, documentaries, news and current affairs programs, specialties and programming days dedicated to topical issues, in-house productions, live broadcasts, numerous first broadcasts, as well as classics of children's programs produced by ARD and ZDF. Offering a large variety of high-quality, target-group-oriented programs free from commercials, for children aged three to thirteen.

Der Kinderkanal von ARD und ZDF
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MDR - MITTELDEUTSCHER RUNDFUNK

The MDR is a public, terrestrial broadcaster based in Leipzig. Belonging to the ARD-consortium of public broadcasting stations, the rbb contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes for Saxony, Saxony-Anhalt and Thuringa.

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GERMANY

NDR – NORDDEUTSCHER RUNDFUNK

NDR Fernsehen – Information and Entertainment from the North. Regional full programme with a clear Northern German emphasis. Belonging to the ARD-consortium of public broadcasting stations.

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PROSIEBEN/SAT.1 TV DEUTSCHLAND GMBH

ProSiebenSat.1 TV Deutschland GmbH combines commercial TV stations SAT.1, ProSieben, kabel eins, sixx, SAT.1 Gold, and ProSieben MAXX. The broadcasting family offers strong broadcast brands with recognition value, clear profiles, and a colorful mix of popular, familiar and big, innovative. ProSiebenSat.1 TV Deutschland is part of the ProSiebenSat.1 Group, one of Europe's leading media groups.

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RBB - RUNDFUNK BERLIN-BRANDENBURG

The rbb is a public, terrestrial broadcaster based in Berlin and Potsdam. Belonging to the ARD-consortium of public broadcasting stations, the rbb contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes. The rbb Drama Department commissions tv-movies as well as series, serials, debuts and feature films.

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RTL TELEVISION GMBH

RTL Television is Germanys leading private broadcaster among viewers (14 to 59 years) and the general public alike. RTL features a strong line-up with highlights in all genres including big entertainment, factual entertainment formats, popular US series, the most popular german daily soap "Gute Zeiten, schlechte Zeiten" (Good Times, Bad Times), fiction formats like the action series „Alarm fur Cobra 11" or „Deutschland 83", comedy shows, news programmes like „RTL Aktuell" and live sporting events such as the Formula 1. RTL Television is part of the The Media Group RTL Germany (RTL, RTL 2, VOX, SuperRTL, n-tv, RTL Nitro), one of the leading media companies in Germany.

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GERMANY

SAARLÄNDISCHER RUNDFUNK

Saarländischer Rundfunk (Saarland Broadcasting - SR) is a public radio and television broadcaster for the German Bundesland (State) of Saarland, with its headquarters in the Broadcasting House Halberg in Saarbrücken. SR is a member of the ARD consortium.

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SKY DEUTSCHLAND FERNSEHEN GMBH & CO. KG

Sky Deutschland is the leading provider of Pay-Tv in Germany and Austria. The company offers subscription-based TV as well as on-demand services to private and business customers. With over 70 exclusive TV channels the SKY platform offert live sport, feature films, series, children programs and documentaries. Sky Deutschland has recently engage in production and co-produced of fiction.

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SWR SÜDWESTDEUTSCHER RUNDFUNK

SWR is a regional public broadcasting station with two television channels serving the southwest of Germany. The corporation has main offices in three cities: Stuttgart, Baden-Baden and Mainz. It is the second largest broadcasting organization within the ARD network of public broadcasters. Its programming provides information, education, guidance and entertainment within a special focus on culture.

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TELE 5

TELE 5 is a national Free-TV channel that addresses all viewers with a broad fictional programming of feature films, series and docu-fiction. As a subsidiary of the Tele Munich Group (TMG), TELE 5 has access to their programme catalogue with German - speakingTV rights to more than 5000 feature films, TV movies and mini-series. Additional acquisitions from major studios and independent distributors complement the versatile movie- and series programme.

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VOX TELEVISION

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WDR – WESTDEUTSCHER RUNDFUNK

The WDR is a public broadcaster based in Cologne. Belonging to the ARD-consortium of public broadcasting stations, the WDR contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes. The WDR Drama Department commissions tv-movies as well as series, serials, debuts and feature films.

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GREECE

Two were the major events at the Greek audiovisual sector during the latter period. A new act on public broadcasting was passed by the Greek Parliament, materialising a major pre-electoral promise of the new left-wing government for the reopening the ERT SA which had been shut down on 11 June 2013. The Hellenic Parliament aiming to ensure the uninterrupted provision of public service broadcasting, approved and voted for the re-opening of ERT S.A. and as a result of that decision on June 2015, ERT started broadcasting again. The renewed ERT broadcasts four digital TV channels (ERT1, ERT2, ERT3 and ERTHD which broadcast ERT1 program in High Definition) and seven different radio programs (Proto Programma, Deutero Programma, Trito Programma, Filia,ERA Sport, KOSMOS and the world-wide program Voice of Greece). The second development is a proposal for a new bill on licensing of television stations which seeks to regulate the licensing procedure for broadcasters, ensuring pluralism, the objective information, the development of healthy competition, simplification of the licensing process and generally provide quality television services.

HELLENIC PARLIAMENT TV

The Television Station of the Hellenic Parliament is operating since 1999 as an autonomous television network, a non-profit mass medium. It broadcasts a daily parliamentary newscast that gives briefings on the day-to-day business of parliament, as well as information on democratic institutions and the parliamentary history of Greece. Moreover, in the framework of promoting cultural subjects, the Television of the Parliament broadcasts classical movies, historical and scientific documentaries, opera, theatrical plays and ballets, while emphasis is given to folklore subjects designating the social history of the different areas of our country.

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ALPHA SATELLITE TELEVISION SA

Alpha is a family-oriented station. It features popular fiction, light entertainment, live programming as well as news and informative shows. It reaches its audience through various consumer touch points and platforms: free-to-air, online and mobile, engaging its viewers in multiple ways. It also has its own studios for in-house productions and its programs are transmitted to Australia (UBI), the US (Dish).

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MEGA CHANNEL

Mega Channel was the first TV station to be established in Greece (1989) on the basis of the legal framework that permitted the formation of private television stations. During its years of operation, has attained a high position in the public's preference. Mega's programming consists mainly of Greek programs such as comedies, dramas, news, current affairs and entertainment shows.

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SKAI TV

Skai TV is a television network part of the Skai Group. It was relaunched in its present form on 1 April 2006 in Athens metropolitan area, and gradually spread its coverage nationwide. Besides analogue terrestrial transmission, it is available on the subscription-based encrypted services of Nova and OTE TV. Skai TV is also a member of Digea, a consortium of private television networks introducing digital terrestrial transmission in Greece. Skai TV airs a diverse programming mix with a focus on entertainment and information.

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MAD TV

Mad TV is one of the most recognizable music channels in Greece part of the largest organization of Mad Music & Media Services which manages and operates on a daily basis four television channels (Mad Greekz / Nova, Mad Cyprus / Cyprus, Mad Al / Albania, Mad lits / OTE TV), one radio station (106.2 Mad Radio) and one internet site.

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NOVA TV

Nova TV is the first digital, satellite TV platform in Greece activated in the field of pay TV. Part of Forthnet Group which is the largest privately owned group that provides broadband and pay TV services in Greece. Forthnet Group is constantly devoted to the development of pioneering proposals for the provision of integrated and inexpensive communication and entertainment services to the Greek family.

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GREECE

MTV GREECE

MTV Greece, began September 1, 2008 and is the Greek version of MTV. It broadcasts mainly foreign and Greek pop, rock, dance and hip hop music, shows of MTV international as: Pimp My Ride, Disaster Date, Made, Room Raiders, Death Valley and greek productions as: Movies & Stars, HitList Hellas, Everyday Girls, MTV News, Your Noise Daily, City Life, Game On and Live @ Your Place.

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ANT1

The business and communicative flagship of the Antenna Group, ANT1 channel was founded in 1989 and since then has been maintained a leading position. It is the first private television station broadcast the voice and image of Greece in USA, Australia and Europe. Programming consists of comedies, dramas, news, current affairs programs, game shows and entertainment shows. Over the years the ANT1 evolved into an innovative channel reflect the views of contemporary Greek and offers high quality information and entertainment aspect, immediacy and consistency.

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Star Channel was founded in 1993 and has more than 100 privately owned broadcasting centers covering 95% of the population. It has gone in the minds of viewers as "the TV station with the best foreign films and series", a fact which has been repeatedly awarded in various television awards. Generally, the program is aimed primarily at viewers aged 15-44 years. Its aim is to further strengthen its position in the television horizon, with equal emphasis on the information and the entertainment sector.

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ERT SA

Nerit is a public service broadcasting corporation. Financed by license fee and advertising, it has national coverage and is broadcasting in Greek. The tv channels are complementary and the programming offers news, current affairs, documentaries, art programs, drama, sports, entertainment and educational programs.

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OTE TV

OTE TV is a satellite and IPTV Pay TV service, being a business unit of the Hellenic Telecommunications Organization (OTE), the largest telecommunications provider in the Greek market. Among a portfolio of over 80 channels, OTE TV offers 3 OTE Cinema channels: OTE Cinema 1 HD, OTE Cinema 2 and OTE Cinema 3.

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GREECE

HUNGARY

The Hungarian market is dominated by the two private channels: RTL Klub (RTL Group) and TV2 (formerly ProsiebenSat1, sold in early 2014), who continue to have the biggest audience market shares. RTL Klub remained the market leader in 2012 with 17.9% (down from 26% in 2007) while TV2 had 15.8% (down from 23% in 2007). During primetime RTL Klub has a share of 29.3% while TV2 has a share of 20.8%. The public channels M1 and M2 had a combined market share in 2012 of 13.3% (an increase in share compared with 2011).

(Audience data source: Eurodata TV Worldwide / AGB Nielsen Media Research Hungary)

Data from the National Media and Communications Authority of Hungary claimed that almost 67% of Hungarian households received digital television in September 2013. Cable services are available in approximately 52% of households at the end of 2012. The sector includes a large number of local and regional cable operators (more than 400) and a few larger operators (UPC Hungary, Fibernet, and T-Kabel). Approximately 14% of cable households were digital at the end of 2012. UPC had 629 300 subscribers at the end of September 2013, of which 57% were digital cable homes. In September 2009 T-Kabel, which was formerly owned by subsidiary companies of Magyar Telekom was officially merged with Magyar Telekom, and the company serves almost 200 000 homes (September 2013).

The Hungarian market includes five satellite services reaching approximately 990 000 homes. These include UPC (UPC Direct) which had 261 600 subscribers in September 2013, T-Home with 304 667 and Digi TV the market leader with approximately 400 000 subscribers. In addition a new service, Hello HD was launched in May 2008 (with approximately 40 000 subscribers in 2013). Magyar Telekom launched the T-Home package in 2008, and launched its Interactive Sat TV platform in 2011, which includes a range of interactive services including an Internet connection. This allows access to the UPC Videothek, also available to IPTV customers.

Hungary switched off analogue terrestrial transmission in October 2013, earlier than expected. Antenna Hungária was granted both licences for the free and pay DTT platforms in 2008. The free-to-air platform (Mindig TV) was launched in December 2008 followed by the pay DTT platform Mindig Extra (formerly Terra+) in May 2010. In October 2013 Antenna Hungária claimed that more than 350 000 homes were linked to Mindig TV. The pay service had almost 120 000 subscribers. The platform offers twelve free (including three versions of Euronews and HD services of the public channels) and twenty-four pay channels. The addition of new channels was made possible by the use of Multiplex B. Having previously been allocated for DVB-H services, Multiplex B became free after the cancellation of these services.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

DUNA TELEVISION (DUNA / DUNA WORLD - MTVA)

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MTVA - MEDIA SERVICE SUPPORT AND ASSET MANAGEMENT FUND

The Media Service Support and Asset Management Fund is the umbrella organization of the Hungarian public service media. Since its foundation in 2011, MTVA has unified and streamlined all content production and asset management activities for the entire Hungarian public service media, thus creating the largest media service organization in Hungary. Whilst producing content for television, radio, online platforms and news agencies, MTVA also manages all assets on behalf of the Hungarian public service broadcaster Duna Media Service Non-Profit Ltd. MTVA also provides support with content production and acquisition.

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RTL KLUB

The Hungarian RTL Television Company was founded on 8 April 1997, and the television channel RTL Klub run by the company was launched in October 1997. RTL Klub has been one of the largest and most influential participants of the Hungarian television market since 1999, and it has continuously preserved its position. In 2011 RTL Group increased its existing shareholding in M-RTL Zrt by 31% and thus the media conglomerate became the single 100% owner of the channel RTL Klub. Simultaneously the media group purchased seven cable channels: Cool, Film+, RTLII, Film+2, sorozat+, RTL+ and Music TV, which comprise the portfolio of RTL Hungary. The CEO of M-RTL Zrt has been Gabriella Vidus since 1 July 2015.

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TV2 GROUP (MTM-SBS)

TV2 is one of the biggest commercial free TV channels in Hungary, reaching millions of viewers day by day. Owing to the extraordinary proportion of local production TV2 is unique and cannot be missed. The premium-quality basic cable channel of the portfolio is SuperTV2, where the audience can enjoy programmes produced specifically for this channel. FEM3 fascinates: provides good advice and tells stories on top of entertaining female spectators daily. PRO4 is the male-oriented channel of TV2 Group: it offers sports content besides movies and series.

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TV2 GROUP (MTM-SBS)

V2 is one of the biggest commercial free TV channels in Hungary, reaching millions of viewers day by day. Owing to the extraordinary proportion of local production TV2 is unique and cannot be missed. The premium-quality basic cable channel of the portfolio is SuperTV2, where the audience can enjoy programmes produced specifically for this channel. FEM3 fascinates: provides good advice and tells stories on top of entertaining female spectators daily. PRO4 is the male-oriented channel of TV2 Group: it offers sports content besides movies and series.

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HUNGARY

Both of these images are from *The Cliff (Hamarinn)*, 2009. Production Company: Pegasus.

ICELAND

The Icelandic TV market is dominated by three channels, which had a combined daily audience share of 94.6% in 2012: the public channel Sjónvarpið (RÚV-TV) had in 2012 a share of 56.3%, while the two major private channels, Stöð 2 (a pay-TV channel) and Skjár 1, had respectively shares of 29.1% and 9.1%. (Audience data source: Eurodata TV Worldwide / Capacent Iceland).

The Icelandic market has thirty channels, four of which broadcast nationally: the pay-TV channels Stöð 2 and Stöð 2 Sport and the free-to-air channels Sjónvarpið (public) and Skjár 1. They can be received by more than 90% of the population. Others, such as Althingi (the parliament channel), INN, N4, Omega, Stöð 2 Extra and the pay-TV channel Stöð 2 Bio reach between 50 and 90% of the population. In October 2013 Stöð 3, a new pay channel targeting the 20-35 age group, started broadcasting. After the launch of three new channels in August 2012 (Stöð 2 Krakkar, Stöð 2 Gull, Stöð 2 Popptíví) by 365 ljósvakamiðlar ehf., a subsidiary of Dagsbrún hf, the company's total number of channels has increased to eleven (others include Stöð 2, Stöð 2 Sport, Stöð 2 Bíó, Stöð 2 Extra and their time-shifted versions). Skjár 1 is controlled by Síminn hf., the former national telecommunications operator Landssími Íslands hf, which was privatised in 2005.

Dagsbrún and Síminn, who own the main private Icelandic channels, are also the most important players on the pay-TV distribution market. Dagsbrún controls the digital terrestrial television platform and the IPTV service launched by Vodafone in 2007. Síminn operates the IPTV platform Sjonvarp Simans, which was launched in 2004.

On 15 April 2011 the Icelandic Parliament adopted a new media act, to implement the Audiovisual Media Services Directive and replace the 2000 broadcasting act, and the 1956 press act. It introduces an obligation for all media in Iceland to be registered with a new media authority, the Media Committee. In November 2012 the Minister of Education, Science and Culture appointed a Committee to propose amendments to the media law, with a focus on media coverage of elections. On February 2013 the Committee, taking into consideration some comments suggested by the OCSE in 2009, issued a report proposing several amendments regarding mostly political advertisement on opinion polls on the elections. The report and proposals were presented to the Minister of Education, Science and Culture and the Parliament, but no amendments had been approved by end 2013.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

RIKISUTVARPID, RUV

Rikisutvarpid, RUV, The Icelandic National Broadcasting Service, is a public service broadcaster owned by the Icelandic state. RUV is financed by state funding and revenues from advertisements. RUV's income can only be allocated for broadcasting purposes. RUV's television network reaches 99,9% of households; market share in viewing throughout 2010 was 51,7% for RUV TV. According to the Broadcasting Act the main obligation of RUV is to promote the Icelandic language and history as well as Iceland's cultural heritage.

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ITC SKJARINN

ITC Skjarinn is an independent media company which divides into four different media units. The cable service distributes over 60 foreign cable channels including DR1, Discovery, BBC World News and more. The VOD service offers the largest VOD service via IPTV in Iceland. Screen One is a pay TV channel financed by subscription fees and advertising revenue. Its main programming needs are scripted dramas and high quality entertainment content. Screen One also produces it's own local programming. Screen One also produces it's own local programming, both scripted and entertainment.

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STÖÐ 2 (CHANNEL 2)

Stöð 2 (Channel 2) is an ad-supported subscription TV channel founded in 1986. On average 45% of Icelandic households subscribe to Stöð 2. Stöð 2 is a part of 365 Media, Icelands leading media company. Stöð 2 offers a selection of the world's highest rated TV shows, award-winning series, latest Hollywood blockbuster features, the most popular local programming, scripted and non-scripted as well as daily local news and news related programming. As a brand Stöð 2 operates several other subscription channels including two sports channels and a movie channel.

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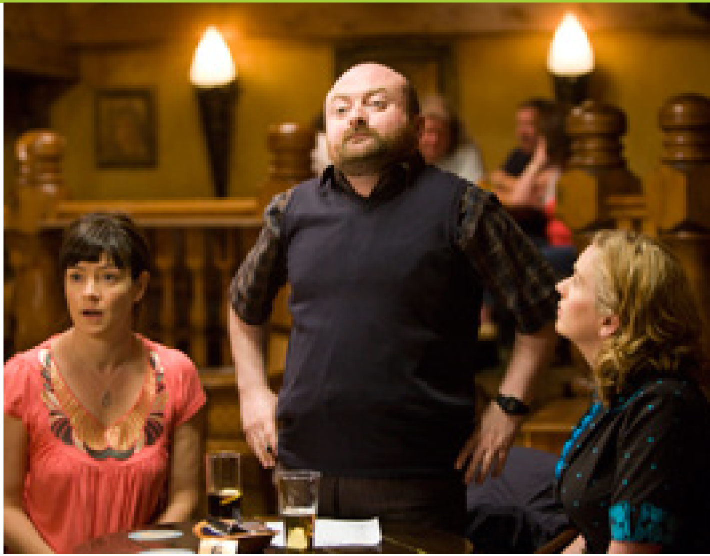
ICELAND



Trivia, 2010 – Production Company: Grand Pictures. Developed with the support of the MEDIA Slate Funding scheme.

IRELAND

In Ireland the national public service broadcaster remains the strongest player in the TV market while British channels and companies continue to play an important role. The public service channels, RTÉ1 and RTÉ2, had a combined market share of 33.1% in 2010 (almost 5% less than in 2006). The private channel, TV3 (launched in 1998) had a 12.4% market share, and is now the second most popular channel. The other two national Irish broadcasters are the public service Irish language channel TG4, and the entertainment channel 3e (owned by TV3). The five most popular UK channels are ranked in the following order: BBC1, UTV, S4C, BBC2, and Sky 1 (with a combined share of 15.1% in 2010). With the launch of DTT services, the public service broadcaster has also launched additional digital channels (Audience data source: Eurodata TV / AGB Nielsen Media Research)

The introduction of DTT in Ireland was long delayed but is finally under way since the end of 2010. The Broadcasting Authority of Ireland announced in August 2010 that commercial DTT has been ruled out for the time being, but the tender for the Multiplexes may be re-launched in 2013 after switch-off. The multipexes of the PSB RTÉ were launched in October 2010 as a trial, with the full service "Saorview" launched in May 2011. The total offer now includes the channels RTÉ 1, RTÉ 2, TV3, 3e, TG4, and RTÉ News Now. New services launched by the PSB are the following: RTÉjr (children) RTÉ One + 1, RTÉ Aertel Digital (teletext), and a trial HD service. Switch-off is planned for October 2012.

The Broadcasting Act of 2009 consolidated all previous broadcasting legislation. The Act also established the new broadcasting regulatory authority (the Broadcasting Authority of Ireland – BAI, which merged the Broadcasting Commission of Ireland (BCI) and Broadcasting Complaints Commission (BCC). The BAI was officially launched in October 2009 and now also has responsibility for the regulation of public service broadcasters in Ireland.

UTV Ireland, a new edition to the UK's UTV Media plc. Media company , commenced broadcasting in January 2015 from its base in Dublin. It is a general entertainment channel, offering national news and current affairs programming and acquired documentary, drama and film content. It is intended that a one-hour peak time news, current affairs and community programme will be delivered each evening initially and that as the channel grows, UTV Ireland will develop further indigenous Irish content.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

RTÉ

Raidió Teilifís Éireann, (*Radio [and] Television of Ireland*; abbreviated as RTÉ) is a semi-state organization and the public service broadcaster of Ireland. It both produces programmes and broadcasts them on television, radio and the internet. RTÉ operates two free-to-air television channels, RTÉ One and RTÉ Two. RTÉ One is the main channel providing a comprehensive range of home-produced Irish factual, entertainment, drama and lifestyle programming, which is complemented by selected acquired material. RTÉ Two is a mixed-genre channel appealing to a variety of audiences across the schedule. During daytime its primary focus is children and sports; in the evening it targets viewers of a young mindset with innovative drama, entertainment and key acquisitions.

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TG4

TG4 (Irish: TG Ceathair or TG a Ceathair) is a public service broadcaster for Irish-language speakers. The channel has been on-air since October 31, 1996 in the Republic of Ireland and since April 2005 in Northern Ireland. The daily Irish language programme schedule is its core service: seven hours of programming in Irish supported by a wide range of material in other languages such as French and English.

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TV3 is a commercial free-to-air television broadcaster in the Republic of Ireland and Northern Ireland which launched on September 20, 1998. It was the country's first independent commercial broadcaster. TV3 is operated by the TV3 Group which also consists of television channel 3e and the online service tv3.ie

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UTV IRELAND

UTV Ireland is Ireland's newest television channel, providing the best in family entertainment, news and current affairs. UTV Ireland Limited is owned and operated by UTV Media plc. The channel was launched on January 1st 2015.

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IRELAND

Dieci Inverni, 2009 – Production Company: Raicinema

ITALY

Apart from the continuous trend of audience shares decrease, the Italian market is still highly concentrated between the two main operators: the public service broadcaster RAI and the private group Mediaset, which hold together 87.2% of the market share of free to air television, which represents a unique situation in Europe. A third pole, even if much smaller, could be represented by the two channels La7 and La7D, previously owned by TI Media (A Telecom Italia company), and since 2013 by Cairo Communication Group, through its new company La7 s.r.l.. LaEFFE is also a recent private TV channel owned by the publisher Feltrinelli Group and it distributes on the digital terrestrial channel and through satellite.

Regarding distribution, Italy is a country historically characterised by the predominance of the reception of terrestrial transmissions with a 84.4% of the audience share. The analogue switch-off throughout the country was completed on 4 July 2012. The DTT network is made up of fifteen multiplexes offering a large number of free and paid channels, including over forty free-to-air channels and some fifty paid channels. These are higher figures than those of other European markets. In addition to the national channels, more than 200 stations were available free of charge in the first semester of 2013.

Two national pay-tv platforms and several other regional platforms coexist in Italy. The national ones are the digital terrestrial platform Mediaset Premium (Mediaset group) and the satellite TV Sky Italia operated by 21st Century Fox that through its subsidiaries Sky Italia and Fox Italia, operates more than 90 channels in Italy, 25 of which target other countries.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

RAI

Rai 1 is the flagship television station of RAI, Italy's national public service broadcaster, and the most watched television channel in the country. Rai2 is one of the three main television channels broadcast by Italian public television company RAI alongside with Rai 1 and Rai 3. Rai 3 is the third cannel of Rai and it offers many public service programmes. Rai Movie, launched in 2003 as RaiSat Cinema World and re-badged in 2006 as RaiSat Cinema, on May 18, 2010 the channel has been re-launched as Rai Movie. It broadcasts mostly Italian films, interview, backstages and documentaries. Rai 4 is an entertainment television channel, programming includes films, TV series and cartoons. Rai 5 has replaced Rai Extra. It broadcasts programs about art, fashion, dance, opera, theatre, cuisine, travel, documentary films and TV Drama..

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MEDIASET

Canale 5 is a classic generalist channel, aimed at the mass family audience. Italia 1 is the Mediaset Group's youngest channel, paying particular attention to the tastes of its audience. Retequattro: offers programmes of traditional shows, much appreciated by women viewers, with programmes aimed at a male audience. Mediaset Italia 2 is a channel dedicated to younger male viewers: TV series, sitcoms, cult cartoons and sports and music programmes. Mediaset Extra is a new thematic channel that offers a selection of archive and current entertainment programmes from the Mediaset network. La5 is the free digital terrestrial channel that offers scheduling dedicated to a modern feminine audience. Iris is a thematic channel dedicated to quality films, although it also broadcast programmes about cinema news, film stars and the most important film festivals

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SKY ITALIA SRL

Sky Italia S.r.l. is an Italian digital satellite television platform owned by News Corporation launched on 1st August 2003, when the former platforms Tele+ (Canal+) and Stream TV (News Corporation and Telecom Italia) merged together. It is similar in many ways to BSkyB's Sky Digital in the United Kingdom and Ireland, and like that network it is a major sports broadcaster

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LA7 S.R.L.

La7 and La7d are private television channels and they are owned by Cairo Communications. Their programmes are typically oriented to information, films, entertainment and sport.

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ITALY

LA EFFE TV

La EffeTv is a media company of Gruppo Feltrinelli. The show schedule is characterized by information, culture and entertainment, among which Cinema and TV Series.

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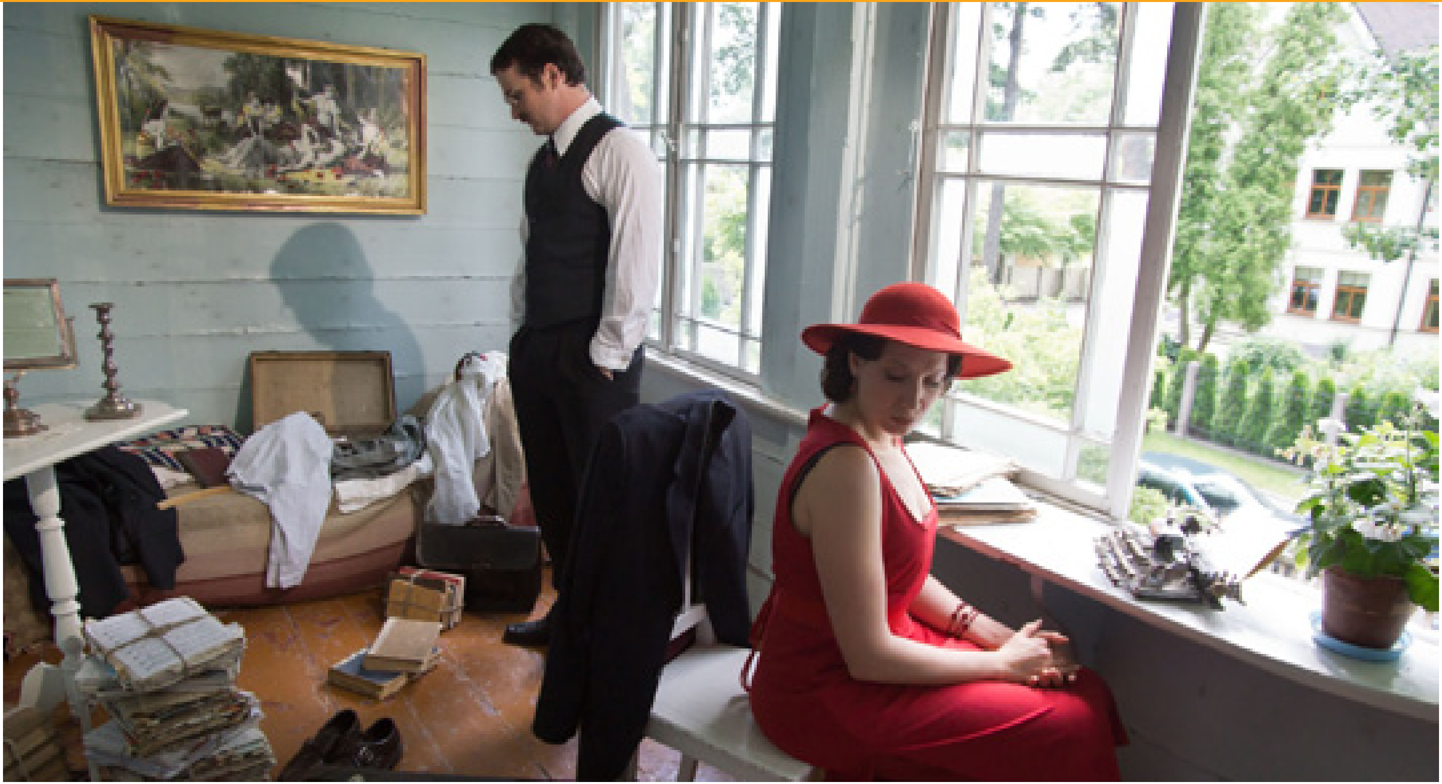
ITALY



Piano Player, dir. Ilona Bruver, Kinolats, 2014

LATVIA

The last couple of years in the television market in Latvia were marked by a substantial investment by the Latvian public broadcaster, LTV, into original content production, which led to its market share growing to 10 %. LTV is now among top three channels in the country. The remaining two are TV3 (11.9%), a private channel broadcasting in the Latvian language, and PBK (9.0%), a private channel broadcasting in the Russian language. (Audience data: TNS)

The distribution of television services is dominated by the cable operators, which supply about 40% of households. The two main providers are Baltcom and Izzi, who merged during September 2013, when AXA Private Equity, the company owning Baltcom, acquired the control of Izzi. They claimed that the two companies will keep operating as separate legal entities. The incumbent operator Lattelecom, 51% owned by the Latvian state and, indirectly, 49% owned by Sweden's TeliaSonera group, is present in the other distribution market segments. The company markets the country's main IPTV platform and operates the only digital terrestrial television platform. DTT was launched in Latvia in 2009 and, after a brief transition period, analogue terrestrial transmissions were switched off in June 2010. The investigation opened by the Latvian competition authority against Lattelecom in March 2010 for abuse of its dominant position on the pay-TV market was discontinued in September 2011.

SOURCE: Creative Europe Desk Latvia; MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

LATVIAN TELEVISION (LTV)

Latvian Television (LTV1 and LTV7) is a public service broadcaster, established in 1954, a member of the EBU since 1993. 60% of its funding is directly allocated by the government, while the rest must be earned by commercial activity. LTV1 is a generalist public channel, with mainly in-house productions, content commissioned from the independent sector in Latvia, as well as acquired content of European origin. The in-house drama production had been limited in the previous years, but has now become a strategic priority. There are currently original drama series in production, the first to be premiered on LTV1 in the autumn season of 2015. LTV7 aims to provide innovative content to younger audiences, focusing on factual entertainment and documentaries, as well as sports.

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LATVIA

LITHUANIA

In recent years the audience market shares of most private channels have been upgrading, television has remained highly important way to spend free time the citizens of Lithuania. Two private channels continued to lead the Lithuanian market: TV3 (Swedish group MTG) remained top channel (17.2%), ahead of LNK (MG Baltic Group), at 17.1%. Despite a drop, LRT, the main channel of public service broadcaster LRT, is in third position (8.8%). After these, there is only one channel with a share above 7%: BTV (Achemos Group).

(Audience data: Eurodata TV Worldwide / TNS LT).

The market is dominated by the cable operators (and MMDS providers), of which the main providers are the second largest cable operator Cgates, who was created after the merger in 2011, and Init, who merged during 2012, when Vinita, Palsatas and Telektronika merged to a single Init company. The cable networks, which still have a low digitisation rate, are facing competition from other digital platforms, which include the Viasat satellite package and various IPTV services, dominated by Teo LT (68% owned by Sweden's TeliaSonera group).

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

LRT

Lithuanian National Radio and Television (LRT) is a non-profit public institution that has been providing regular radio services since 1926 and television broadcasts - since 1957. LRT operates three national television channels (LRT Televizija, LRT Kultura, LRT Lituanica) and three radio channels (LRT Radijas, LRT Klasika, LRT Opus), also news website www.lrt.lt. LRT is funded directly from the State budget and has no advertising since the 1st January, 2015. Its activities are supervised by the LRT Council.

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UAB „TELE-3“

TV3, TV6 and TV8 channels are a part of international entertainment group – MTG (Modern Times Group). TV3 television – Nr.1 in Lithuania for 11 years! TV3 brings the best movies, TV series and local programs. Channel slogan – It is good to be together, so everyone is invited to turn on TV and enjoy the magical world of entertainment. If you want a bit more "edgy" program with a taste of best sports – UEFA, Formula 1 and basketball – turn on TV6. Mature women are invited to relax while watching love movies and TV series while watching TV8 channel.

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LAISVAS IR NEPRIKLAUSOMAS KANALAS

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LITHUANIA

LIETUVOS RYTO TELEVIZIJA (LIETUVOS RYTAS TV)

"Lietuvos ryto" TV was launchd at October 2008 as a part of "Lietuvos rytas" Media Group. It's commercial Free-to–Air channel, Internet simulcast is available as well. TV channel is oriented to general audience. There are daily News every hour starting midday until 10:30 PM, local produced shows, journalistic investigations, game-shows, movies, documentaries, TV series - all interesting and attractive genres. We are opened for a new ideas!

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LITHUANIA

LUXEMBOURG

Luxembourg has long had an official policy of welcoming pan-European companies. It is home, for example, to SES Global – the world's leading satellite operator thanks to its Astra system, the RTL Group, Europe's leading audiovisual group, and M7, the satellite platform that distributes channel packages. In the field of on-demand audiovisual services, Luxembourg acts as a host country for the provision of cross-border services and is home the iTunes Store (Apple) and other services. Microsoft's Xbox Live is also based in Luxembourg but is considered a distribution platform by the authorities and not an on-demand audiovisual service.

The law on the creation of the public service body Autorité luxembourgeoise indépendante de l'audiovisuel (Luxembourg Independent Audiovisual Authority – ALIA) was formally adopted on 27 August 2013 and entered into force on 1 December 2013. It reforms Luxembourg's regulatory bodies by replacing most of the former authorities by a single competent authority.

The audience share of RTL Lëtzebuerg in 2012 was 35.4% between 7 and 8 pm but continued to decline during the daytime. According to the 2012 Plurimedia Survey conducted by TNS Ilres, RTL Tele Lëtzebuerg reached 114 800 viewers (or 26.1% of the population), while the channel Den 2ten RTL reached 9000 (2%). CLT-UFA operates Luxembourg's digital terrestrial platform, which provides access to 13 channels, eleven of which are controlled by the RTL Group. The two independent channels are Luxe TV and Air TV, a new general entertainment channel launched in February 2011.

Cable, which supplies nearly two-thirds of households, dominates in Luxembourg. Most of the fifty or so operators identified in the country are local authorities or nonprofit associations. In 2013, only three companies were still operating in this sector. Eltrona dominates the market with the Imagin package, which had 115 000 subscribers at the end of 2010. Its main competitors are Sogel and Numericable, which was taken over in July 2011 by the Luxembourg based companies Deficom (60%) and Apax (40%). The telecommunications operator Entreprise des P&T, renamed Post Telecom, is a significant competitor in the pay-TV market, with its package, PostTV, which had signed up 22 000 subscribers by the end of 2011. The Belgian operator Belgacom has also gained a foothold on the market by setting up a subsidiary, Tango SA.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

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LUXEMBOURG

MALTA

Public Broadcasting Services Ltd. is an independent public service provider. It has two national TV channels - TVM and TVM2 – plus three national radio channels. These are all financed by advertising and a public service grant for specific programs of national interest. While TVM is the national broadcasting channel catering for all types of audiences, TVM2 is an informative and cultural channel with a strong documentary profile.

Both channels are broadcast free-to-air, on the cable system, on the digital aerial, and in HD format. PBS Ltd also operate the national HDTV platform which carries other national commercial and political TV stations..

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

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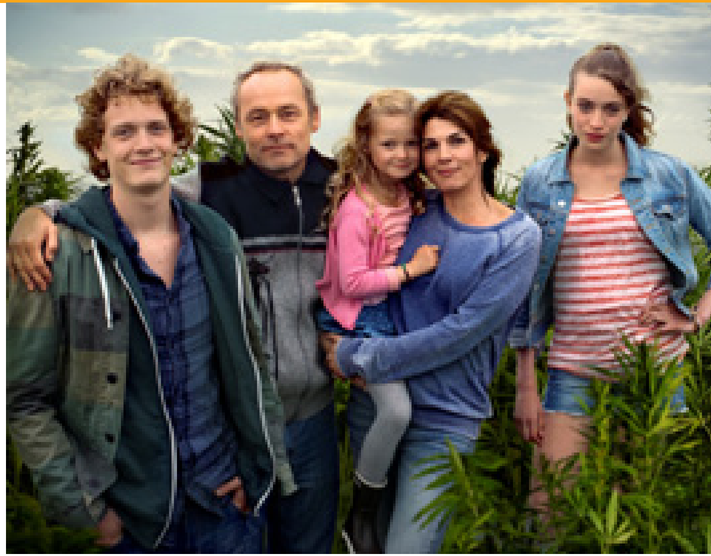
MALTA

Alleen op de Wereld, produced by Lemming Film - 2015



Hollands Hoop, directed by Dana Nechushtan, produced by Lemming Film, VARA, VPRO, NTR - 2014

NETHERLANDS

The most important players in the Dutch market are the public broadcasters, with the national channels NPO 1, NPO 2, NPO 3, and all the digital channels grouped together under the Ned 24 banner, as well as the RTL group, whose channels RTL 4, RTL 5, RTL 7, RTL 8 and RTL Lounge are transmitted under Luxembourg law. The third provider, SBS Broadcasting (NET 5, SBS 6 and Veronica), was sold by ProSiebenSat.1 Media AG in May 2011 to John de Mol's Talpa Media group, which is associated with the Finnish group Sanoma.

In 2010, the daily audience share of NPO 1 rose by 1.5%, thus enabling the channel to reach 21.5%, which was higher than the figure posted in 2008. Following the public channel in audience share terms are the private channels RTL4 and SBS6 with 14.4 and 10% respectively. Their market shares have actually risen in the past two years. The two other public channels (NPO 2 and NPO 3) each have a daily share of slightly under 7%, while the figure for the four private channels - NET 5, RTL 7, RTL 5 and Veronica - is between 3 and 5%. Eight other channels have a daily audience of between 1 and 2%. (Audience data source: Eurodata TV Worldwide / Stichting Kijkonderzoek).

The Dutch public service broadcasting system is made up of some 20 national, 13 regional and 350 local broadcasters.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

AVROTROS

Since the first of January 2014 AVRO merged with broadcaster TROS, now they operate under the name AVROTROS.

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BNN-VARA

Since the first of January 2014 BNN merged with broadcaster VARA, now they operate under the name BNN-VARA. Both parties keep their own name and target different audiences. BNN targets teenage and young adult audiences. It produces entertainment and informative television programs, radio programs, and feature films.

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KRO-NCRV

Since the first of January 2014 KRO and NCRV and RKK merged. Now they operate under the name KRO-NRCV.

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EO

EO is financed by the Dutch government. It transmits on Nederland 1, 2 and 3 which are national channels that transmit by cable and terrestrial network.

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HUMAN

The Humanistische Omroep (HUMAN) is one of the smaller public broadcasting organizations in the Netherlands. It is a public service association. HUMAN produces programmes for Dutch television, makes radio talkshows and interactive websites.

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OMROEP MAX

Omroep MAX is a station broadcast in The Netherlands. MAX's programming focuses on people aged 50 years and older. MAX transmits on Nederland 1 and Nederland 2.

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NETHERLANDS

NTR

NTR is the independent Dutch public service broadcaster specialising in information, education and culture. NTR's themes are based on the statutory duties of the three public service broadcasters which in 2010 merged into NTR: NPS, Teleac and RVU.

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VPRO

VPRO is one in the group of the 9 biggest broadcasting associations in the Netherlands. It is financed by license fees and advertising. There are 3 public channels in the Netherlands that transmit by free cable, free satellite, free terrestrial and free digital television. VPRO can be found on all 3 channels.

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Occupied (Yellow Bird Norway AS) has received funding from the TV-programming scheme of the MEDIA programme. (Photo: Aksel Jermstad)

NORWAY

In Norway NRK remains the leading broadcasting group with a daily market share of 41% for their three public channels (NRK1, NRK2 and NRK3), NRK1 with 30.2%, is the most watched. The TV 2 group have five channels and a combined market share of 24.8%, TVNorge (Discovery Networks Norway) trailing behind with 7.4% and TV3 (Modern Times Group) with 4.2%. (All figures from 2012)

TV3 (MTG) and Viasat 4 (MTG) are established in the UK, requiring them to comply with the Audiovisual Media Services Directive (AVMSD) but not with specific provisions under Norwegian legislation, particularly in respect of programming and advertising.

Several new channels have emerged in the Norwegian market in the last years. Satellite TV distributor Viasat (MTG) has restructured its sports channels package, launching Viasat Sport and Viasat Motor. The two main private channels TVNorge and TV 2 launched HD versions. Frikanalen, an open, non-commercial channel owned by around sixty nongovernmental organisations was launched in 2008. And in recent years Norwegian newspapers and media publishers have started investing in, and are breaking new ground with online streaming TV-channels, with VGTV owned by Schibsted as the largest player.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

NRK NORSK RIKSKRINGKASTING (THE NORWEGIAN BROADCASTING CORPORATION)

Norsk Rikskringkasting (The Norwegian Broadcasting Corporation) is the Norwegian government-owned broadcasting company. It is non-commercial and based on public service principles. NRK is the largest media organisation in Norway. It is a founding member of the European Broadcasting Union.

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TV2 NORWAY

TV 2 is the largest commercial television station in Norway and the second largest TV station in Norway. TV 2 started to broadcast in 1992, based on a governmental license to broadcast national commercial terrestrial television.

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MTG TV

MTG TV, the former TV3 Norway is part of Modern Times Group, the channel also represents, Viasat 4 (viasat4.no), TV6 (tv6norge.no) and MTV (mtv.no) with play-channels in Norway.

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TVNORGE

TVNorge is Norway's second largest commercial channel and went on the air in 1988 as the first advertising supported channel in Norway. TVNorge is part of Discovery Networks Norway that also includes TV channels FEM, VOX, MAX, TLC and Discovery.

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POLAND

The Polish TV market is dominated by three commercial entities (TVN group, Polsat group, nc+) and one public broadcaster (TVP), which held a total of 95% of the market share. Three main private channels present respectively: 33% (Polsat group), 28% (TVN group) and 16% (nc+) shares on the market. The public broadcaster (TVP) has 18% of the market share. The rest of TV market is divided between independent providers and local broadcasters.

In term of major audience market share the public channel TVP1 still heads daily audience figures, with a 12,3% market share (compared with 12,95% in 2013). TVP2, the second public channel presents a 9,4 % shares on the market. The public channels (TVP1, TVP2, TVP Kultura, TVP Info, TVP Rozrywka, TVP Seriale, TVP Sport, TVP Historia, TV Polonia, TVP ABC, TVP HD, TVP Regionalna) have a daily audience market share of 31 % (an increase of 2,5% compared to 2013). Two main private channels, Polsat and TVN have seen their audience dwindle: their market share at the end of 2014 was 11,8% and 11,7% respectively. (Audience data source: KRRiT, Nielsen Audience Measurement)

Following these four channels (TVP1, TVP2, Polsat, TVN), there were eleven that commanded between 3,5% and 1,1% of the audience market share. The fragmentation of the audience is encouraging the most important groups that observe the audience of their main channels shrinking, to increase the number of special interest channels.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

POLSAT

Polsat is an open TV channel that belongs to Polsat Group. It buys movies for all rights. The channel is also available in North America. Polsat airs 168 hours per week. Polsat is the 2nd national TV channel available via the terrestrial analogue network. It belongs to the Polsat group of channels which includes: Polsat Film, Polsat News, Polsat Sport, Polsat Sport Extra, Polsat Café, Polsat HD, Polsat Play and Polsat Romans. The broadcast programming of Polsat is targeted on general audience.

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TVP

TVP is a Polish public station, operating 2 nation-wide channels (TVP1, TVP2) a number of thematic channels: TVP Info, TVP Kultura, TVP Sport, TVP History, TVP ABC, TVP Rozrywka, TVP Seriale and a satellite channel TVP Polonia. Its main activity is in broadcasting, production, worldwide distribution and acquisition.

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NC+

nc+ is an advanced digital platform with the richest offer, established by the merger of the two market leaders: CYFRA+ and n. It has more than 140 selected channels of the highest quality, including more than 50 in HD, and gives access to more than 600 FTA channels. nc+ offers the most prestigious sport events and the latest film premieres straight from cinemas, available on its own six premium channels: CANAL+ HD, CANAL+ Film HD, CANAL+ Film2 HD, CANAL+ Family HD, CANAL+ Family2 HD and CANAL+ Sport HD. nc+ platform is also the broadcaster of wide range of thematic channels – Ale kino+, channel for movie enthusiasts, documentary Planete+, lifestyle Domo+ and Kuchnia+, MiniMini+ and teleTOON+ dedicated to children as well as nSport+, the first layer of access to the best nc+ sporting events.

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HBO POLAND

HBO Poland is the Polish subsidiary of the Home Box Office (HBO). HBO Poland is a paid television station.

HBO programming consists primarily of theatrically released motion pictures and original television series, along with made-for-cable movies and documentaries, boxing matches and occasional stand-up comedy and concert specials. It operates several channels: HBO, HBO2, HBO Comedy.

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TVN

TVN is the leading free-to-air channel in Poland. Additionally, TVN Group operates 3 other FTA channels TVN 7, TTV and local NTL Radomsko as well as seven thematic pay channels: TVN 24, TVN Style, TVN Turbo, TVN24 Biznes & Swiat, TVN Meteo, ITVN and Mango. TVN also offers an extensive portfolio of online products including internet VOD service Player.pl.

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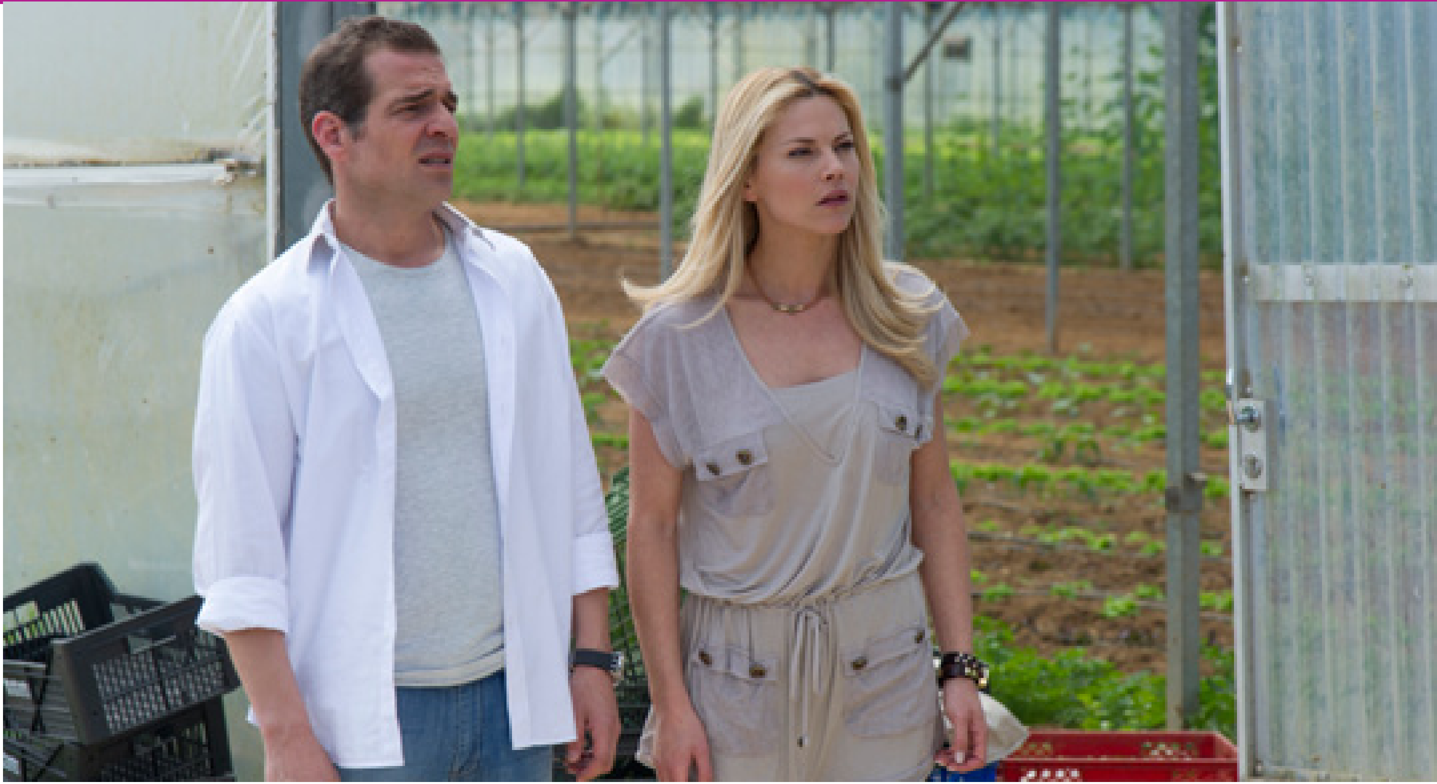
POLAND



Small Village Of Beirais

PORTUGAL

The Portuguese television market is dominated by three channels, which had a combined audience share of 59.8% in 2012. Due to a change of methodology and panel introduced in March 2012, the comparison of data between 2012 and former years should be done with care. TVI (Grupa Media Capital) still had the best market share (24.2%). With 21.7% in 2012, SIC regained the second place it had lost in 2009, benefiting from a huge drop in the audience of RTP1 (24.2% in 2010, 21.6% in 2011, 13.9% in 2012). The audience share of the second public service channel RTP2 also fell from 4.5% to 3.4%. (Audience data sources: Eurodata TV / Marktest - Audimetria / Mediamonitor)

According to ANACOM (National Communications Authority), in the second quarter of 2013 about 1433 million households were able to receive TV by cable, which was a decrease of 2.6% compared to the same period of 2012, while 633 000 subscribe to satellite packages, registering a loss of 2.1% compared to the previous quarter of 2013, and 35 000 fewer than the same period in 2012 (-5.3%). The number of subscribers to a fibre optic pay-TV service has been increasing during recent years, rising from 307 000 in 2012 to 434 000 for the same period of 2013, with an increase of 27%. IPTV (DSL/ IP) has become the second most important technology (after cable) in terms of number of subscribers in Portugal, (644 000 in the second quarter of 2013, with an increase of 3.4% if compared to the beginning of the year).

Several pay-TV operators offer services on different platforms. According to ANACOM data, Zon Multimedia is still the main pay-TV player in Portugal, controlling 49% of the pay-TV market through its cable and satellite broadcasting subsidiary Zon TV Cabo. Portugal Telecom, which offers the Meo TV service (satellite and IPTV), has 40.4% of subscribers, while the company Cabovisao (sold in March 2012 by the Canadian company Cogeco Cable to the European group Altice, the operation receiving a green light by national competition authority) is the third player in the pay- TV market with a share of subscriptions of 7.4%. Apart from Meo TV, there are two other IPTV services available in Portugal: Sonaecom (a subsidiary of Sonae and France Télécom) which offers the triple-play service (Clix TV); and Vodafone which offers "Vodafone TV" as part of double and triple play services.

The introduction of DTT was initiated in early 2008 with one tender for a free-to-air Multiplex (A) and a second tender for five Multiplexes providing pay-TV services (two with national coverage B and C, and a further three on partial territorial coverage, D, E and F). PT Comunicações (Portugal Telecom) was awarded the license for the free-to-air Multiplex, and the service was officially launched in April 2009. It carries the four national terrestrial channels (RTP1 and 2, TVI and SIC) and two autonomous regional channels. The total switch-off of the analogue signal took place in April 2012. The fact that digital terrestrial television only offers four general-interest channels is also the subject of discussion. During a Parliamentary hearing, Portugal's Minister of State and Regional Development, Miguel Poiares Maduro, stated that the Government believes that the current supply of DTT in Portugal is "insufficient" and should be increased, and that during 2014 two new free-to-air channels should be added.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

RTP

RTP is a corporation which broadcasts Radio & TV channels of public service, under concession contract, since its foundation (1957). RTP is 100% owned by the Portuguese state, mainly supported by license fees and commercial income, mostly from advertising and sponsorship. RTP produces and broadcasts 8 different television channels and 8 different radio channels, serving a wide array of audiences in Portugal and abroad.

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S.I.C.: SOCIEDADE INDEPENDENTE DE COMUNICAÇÃO, S.A.

SIC is the first private television channel in Portugal. It started to broadcast, through FTA, on October 6, 1992, contributing to the plurality and independence of news and diversity of entertainment. In just three years, in May 1995, SIC lead the race in audience rating through its strong focus on news programs, entertainment, factual and fictional series, all spoken in Portuguese.
Always in search of innovation, in 2000, SIC entered the world of cable channels and in 2007 entered the digital age with interactive and multi-platform content. SIC produces and broadcast 7 television channels for Portugal and abroad, with a main FTA channel, an international chan-

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TVI

TVI is the leading FTA TV Channel in Portugal, since 2000. In 2014, the channel registered a share of 23.5% in all day and of 26.5% in prime time, driven by its entertainment, local drama and news offers. Aside from the FTA TV channel TVI, the company, owned by Media Capital Group, also owns the Pay TV channels TVI24, TVI Ficção, TVI Internacional and +TVI. TVI's group of channels led audiences in 2014 both in all day and prime time, with shares of 25.5% and 28.1%, reaching a daily average audience of 5,212 million viewers (43.7 million in prime time). TVI's portfolio also includes TVI Direct, a pay tv channel for the live transmission 24hrs/day of the main channel's reality shows.

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CANAL Q

Born on 29 March 2010 and the Q channel is a channel of humor, entertainment and information. It is a channel in constant satire and descontruction of the information and real life narratives of our time. It questions the established idea of what is a television channel. 90% of the programs are written, produced, performed, presented and interpreted from scratch, from ideas and original formats created exclusively for the channel. So it produces more than 40 hours a week. Channel Q is available on channel 15 of the MEO and NOS platforms, also in Angola, Mozambique, France, Luxembourg, Monaco and Andorra. In 2014, Canal Q received the award for Best National Entertainment Channel by Meios & Publicidade, one of the most recognize awards in Portugal. Also won one of the highest distinctions in terms of design with the Grand Prix of Media & Advertising.

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ROMANIA

In Romania, the main players in the television market are Central European Media Enterprises (CME) and the Intact Media Group. In 2012, the audience share of Pro TV (CME) was 14.7% and that of Antena 1 (Intact Media Group) was 11%. CME has a total market share of about 20% (including Pro Cinema, Sport.ro, Acasa and Acasa Gold), and Intact Media Group about 19%. The public service channels had a combined daily audience share of 7% in 2012 (down from 24.1% in 2006). In the Summer of 2012, TVR Info closed and TVR2 merged with TVR Cultural.

TVR Info relaunched as TVR News in co-operation with Euronews in 2012. The German media group ProSiebenSat1 AG left the Romanian market after selling its main channel to the Greek Antenna Media Group at the end of 2013. Romania is an important centre for thematic television channels that target other countries. These include also the Film+ channels (Czech and Slovak Republics, Hungary, Romania) all of which are part of the RTL Group.

Approximately 40 new national channels were licensed in Romania in the years 2012 and 2013, including channels from the operator RCS & RDS.

Cable was the most important platform in Romania (50% of households) at the end of 20112. RCS & RDS is considered the main player in the market with 1.6 million subscribers end 2012.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

TVR (ROMANIAN NATIONAL TELEVISION)

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ROMANIA

SLOVAKIA

In the Slovak Republic, the commercial channels dominate the market. The channels of Central European Media Enterprises (TV Markiza, TV Doma and Dajto) had a combined market share of 31.9% in 2012. The public service channels of STV had a combined share of 11.7%. The second commercial operator Mac TV had an audience share of 24.9% in 2012 (TV Joj and Joj Plus). (Audience data source: Eurodata TV Worldwide / PMT / TNS SK).

The commercial operators have launched a range of new channels in the Slovak Republic in 2012 and 2013: DajtoTV, Senzi TV, Fooor TV and Wau TV, all of which are available over free DTT.

Cable and satellite each deliver television services to around 40% of homes. In September 2013, the main cable operator, UPC (Liberty Global) had 194 500 subscribers, which was almost one third of the cable market. There are five satellite packages offered by three companies. The two packages Skylink and CS Link are part of Luxembourg company M7. Skylink is being promoted as a pay package, while CS Link is free. They serve a combined total of approximately 1.6 million homes in the Slovak and Czech Republics. DIGI TV is another important player and was purchased in 2013 by Slovak Telecom from RCS & RDS. UPC Direct (Liberty Global) had 62 200 subscribers in September 2013. A fifth satellite service was launched in 2010 when T-Com (Slovak Telecom) made the IPTV Magio service available over satellite. Magio had over 190 000 subscribers in September 2013 (to the IPTV and satellite services combined). IPTV is also offered by three other companies: Orange, Slovanet, and Swan.

Towercom operates four DTT Multiplexes. They carry three public service channels (including a PSB HD channel), and ten private channels. The Towercom subsidiary, Towerhome, launched pay DTT services in 2013 offering 12 additional channels. In 2011 Slovak Television (STV) and Slovak Radio (SRo) merged into a single public institution under the Act on Slovak Television and Radio of 15 December 2010. The Act also established a new system for financing of the public service. The strategy was to switch to state budget contribution to the financing. However, this system was never implemented. New legislation came into effect in January 2013 that re-instated the previous broadcasting fee for households.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

SLOVENIA

In Slovenia, the television market is dominated by the channels of the Central European Media Enterprises (CME) Group (Pop TV, Kanal A and the Pro Plus family of channels). These had an audience share of 36.6% in 2012. The channels of public service broadcaster RTV Slovenija, including regional channels had a strong share of 27.7% during the same period. In February 2012, another significant player TV3 (part of the Modern Times Group - MTG), ceased operating and left the Slovenian market claiming an unfair domination of the CME Group in the advertising market. This case is still pending with the competition authorities. (Audience data source: Eurodata TV Worldwide / AGB Nielsen Media Research Slovenia)

Cable served more than 30% of homes at the end of 2012. The main operator is Telemach (formerly Mid Europa Partners who sold its investment in Telemach to UnitedGlobalCom), with approximately 200 000 subscribers. Telemach has gradually been taking over smaller operators including Elektro Turnsek and Kabel TV in the summer of 2013.

More than 26% of Slovenian homes use IPTV services and three different services are available. SiOL (Telekom Slovenije) had approximately 126 636 subscribers in March 2013 (56% of the market). Further data from 2012 (Post and Electronic Communications Agency of the Republic of Slovenia - AKOS) shows that T2 had 32% of the market. The only satellite package, Total TV (Mid Europa Partners), launched in 2007, has approximately 25 000 customers.

The official DVB-T website reports reception problems in areas where there is interference from the Italian DTT transmissions. The main multiplex of RTV Slovenija has eight national and four regional channels. Six more local channels are provided on local multiplexes. Norkring (Multiplex B) left in February 2012 claiming that the public service broadcaster violated competition regulations by hosting commercial channels. Norkring dismantled the second Multiplex in Slovenia. A tender was launched for a third Multiplex (C) in October 2012, and this Multiplex was also granted to RTV Slovenija In June 2012, the Media Act was amended providing for the cost free transmission of TV channels of special importance on the DTT multiplex operated by RTV Slovenija.

Also in June 2012, the Digital Broadcasting Act was amended to forbid the hosting of commercial TV channels on the public multiplex when other DTT multiplexes are available.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

PRO PLUS

The leading media company in Slovenia, PRO PLUS constantly generates new trends through the two Free TV channels with the greatest audience shares in Slovenia - POP TV and Kanal A, as well as through its Cable TV channels - BRIO, KINO and OTO. The company has a significant on-line presence through 24ur.com, Slovenia's most visited website, 7 specialised web portals and the first video on-demand internet service in Slovenia, VOYO.

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RTV SLOVENIA

RTV Slovenija is a Public Institution and non-profit organisation. It renders public service in the field of radio and television activities in accordance to the RTV Slovenija Act. It produces two national TV programmes (TV SLO Channel 1and TV SLO Channel 2), two regional TV programmes (TV Koper - Capodistria and TV Maribor), TV programmes for Italian and Hungarian National Communities, three national radio programmes, regional radio programmes and the radio programme for foreign public. The Editorial Department for Acquired Drama Programmes is responsible for acquiring and programming of foreign fiction programmes. RTV Slovenia is devoted to quality programmes of all genres from all over the world. It has five weekly slots for feature films and six for TV series, while two slots are especially dedicated to European productions.

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SPAIN

In Spain, 2012 saw the private channels Telecinco (Mediaset Group) and Antena 3) outdoing the public channel TVE La Primera, with a daily audience share of, respectively, 13.9%, 12.5% and 12.2%. The trend of a steady loss of market share, already registered in the past 5 years, is due to audience fragmentation and the introduction of a plurality of niche channels. Other significant channels include Cuatro with 6.0% and La Sexta (created by a Spanish- Mexican consortium in 2006) with 4.9%. The niche channel Antena.neox (with a focus on youth entertainment) has moved above the second public service channel TVE La 2: their shares are 2.6% and 2.5% respectively.

The economic difficulties and the reduced ability for consumer spending have affected the pay-TV market, which, according to the quarterly report for the period April-June 2013 released by Comisión del Mercado de las Telecomunicaciones (CMT), is experiencing a deep crisis with a total loss of 502,190 subscriptions from the same period in 2012. The loss seems to be affecting all of the operators. The market is still dominated by the satellite package Canal+ with more than 1 700 000 subscribers in March 2013.

On the 15th February 2013, the Spanish Government approved the Digital Agenda for Spain, establishing the Government's strategy for the development of the economy and digital society in Spain for the period 2013-2015, with the aim to fulfill the goals set by the Digital Agenda for Europe strategy for 2015 and 2020.

On 4 June 2013, a new regulatory body, la Comisión Nacional de los Mercados y la Competencia (CNMC), was established. It is an independent body, which will merge almost all of the existing regulatory agencies.

On 1 August 2012, an amendment to the Audiovisual Act 7/2010 was adopted by the Spanish parliament, introducing a new legal framework for regional public service broadcasters, which aims at allowing regional public service broadcasters greater flexibility in the provision of their audiovisual media services.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

ANTENA 3

Antena 3 is a private Spanish terrestrial channel. Its programming is generalist. When it was launched, Antena 3 was the first national private channel in Spain. It is controlled by Planeta de Agostini and RTL Group.

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ARAGON TELEVISION

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SPAIN

CANAL EXTREMADURA TELEVISION

Canal is an autonomous public channel of Extremadura. It is broadcast in Spanish with regional coverage and free access.

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CANAL SUR

Canal Sur is the main regional autonomous public channel of Andalusia.

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RTV CASTILLA LA MANCHA

CMT is the first public autonomous channel in Castilla-La Mancha.

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EITB – EUSKAL IRRATI ETA TELEBISTA

EITB is the first communication group of Euskadi It has more than 25 years of experience in the communication world. During this time it has consolidated as a modern and efficient media that daily goes over to more than one million citizens, to whom it mainly offers information and entertainment. There are three different channels (ETB 1, ETB 2, ETB 3) The first channels is just in Basque Language.

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SPAIN

LA SEXTA – (TELEFILM)

La Sexta is a Spanish private terrestrial generalist channel. When it was launched in 2006, la Sexta became the sixth Spanish national terrestrial channel. La Sexta is controled by the GAMP (which includes Mediapro) and the mexican group Televisa.

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TELEVISIÓ DE CATALUNYA

Televisió de Catalunya is an autonomous public channel of Catalonia. It is broadcast in Catalonia, with free access, in Catalan. Televisió de Catalunya deals with six different channels: TV3, 33, 3/24, Esports 3, Super 3 and TV3CAT.

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TELECINCO – GESTEVISION

Telecinco is a Spanish commercial television channel operated by Gestevisión Telecinco. Launched in 1990 as Tele 5, it was the fifth of the national terrestrial television channels. In 1997, Tele 5 was rebranded as Telecinco, dropping the flower logo seen in other Mediaset channel logos. Telecinco is a general channel catering for all audiences. It shows popular films, series and sport.

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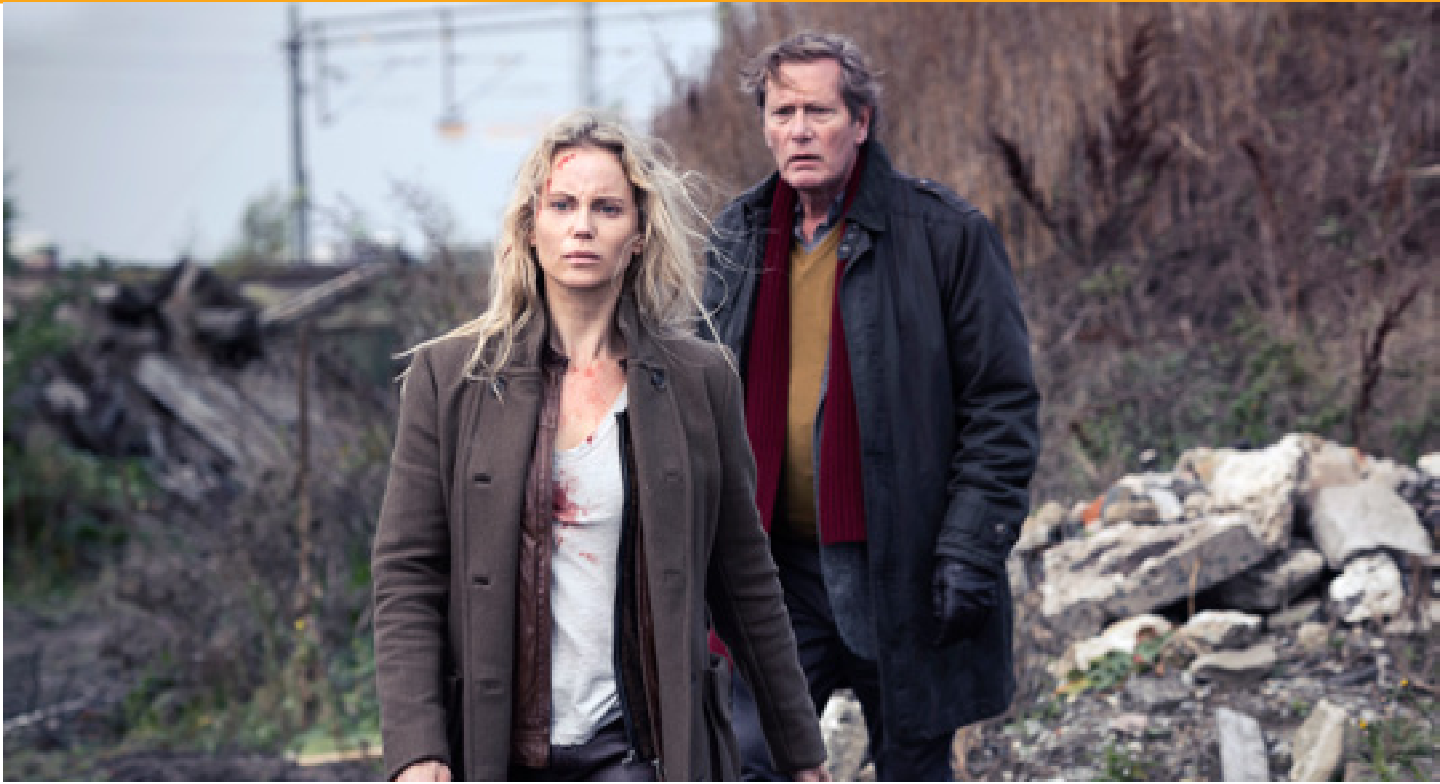

Sofia Helin and Dag Malmberg in The Bridge - Season Three which received TV Programming support from Creative Europe (Photo: Carolina Romare)

SWEDEN

The main players in the Swedish broadcasting market are public broadcaster SVT, private Swedish groups Bonnier (TV4 and C MORE channels) and Modern Times Group – MTG (TV3, TV6, TV8, Viasat Film and Viasat channels, some of which are broadcast from the United Kingdom), and Discovery Networks Sweden, whose channels Kanal 5, Kanal 9 and Kanal 11 are also transmitted from the United Kingdom.

Regarding distribution, the main players in the market remain the Swedish groups MTG, TeliaSonera and Teracom, as well as cable operator Com Hem and the Norwegian Telenor group. Com Hem dominates the cable television market with 1 789 000 homes connected as of September 2013, showing an increase of 41 000 homes if compared to 2012.

As in the other Nordic countries, two satellite packages are in competition in the market: Canal Digital (Telenor) and Viasat (MTG), who each have more than 300 000 subscribers in Sweden.

The Telia platform (TeliaSonera) continues to dominate the IPTV market, having reached 560 000 subscribers for its IPTV service by the end of 2012, 13% more than one year earlier. Thanks to its rapidly growing number of subscribers, Telia is now the third largest pay-TV operator behind Com Hem (cable).

Regarding legal developments, the new Radio and Television Act entered into force on 1 August 2010, transposing the Audiovisual Media Services Directive (2007). The Act defines and regulates sponsorship, advertising and product placement. It also creates a new audiovisual regulatory body, Myndigheten för radio och tv (Swedish Broadcasting Authority), which replaces the radio and television authority (Radio-och TV- Verket, RTVV) and the Swedish audiovisual commission (Granskningsnämnden för radio och TV, GRN).

In June 2013 the Swedish Parliament approved some amendments to the Act on Copyright in Literary and Artistic Works, which entered into force on 1 November 2013, introducing provisions enhancing the application of extended collective licensing, with particular regard to cases of large amounts of copyrighted material used by the same user and when a direct agreement with the right holder is impossible. Nonetheless, it is possible for a rightholder to refuse this kind of exploitation.

In October 2013 the Government presented the Bill "Culture and Accessibility – Public Radio and Television 2014-2019", containing the guidelines of media policy for public service broadcasting for this period. Particular requirements are imposed as regards the accessibility to the services by people with disabilities: subtitling, sign language interpretation, audio description, and text read aloud.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

SVERIGES TELEVISION (SVT)

SVT is the Swedish public service broadcaster financed by a compulsory fee. They had 64 hours of broadcasting per day on all their channels. 26 % of the programming is fiction.

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DISCOVERY NETWORKS SWEDEN

Discovery Networks Sweden – Channels showing drama are Kanal 5, Kanal 9 and Kanal 11. Kanal 5 has an entertainment, feature film and series profile. Kanal 9 targets the male viewer with a mix of high quality drama, sports and feature films. Kanal 11 targets the female viewer with a mix of drama, glamour and relationships.

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TV4 / C MORE

TV4 Group started its transmissions in 1990. TV4Group has a range of channels under the TV4 brand. C More (previously known as Canal+) was started by French Canal+ in 1997 and is owned by the Bonnier Group. CMore is a pay TV service with 15 channels.

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TV3 / TV6 / TV8 / TV10

TV3 started its transmissions in 1987 and was the first commercial channel in Sweden. It has an entertainment and feature film profile. TV6 has a profile of entertainment, sports and fact shows. TV8 has a focus on series and lifestyle. TV10 focuses on sports and documentaries. These channels are all owned by Viasat which is part of MTG (Modern Times Group).

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VIASAT / VIASAT FILM

Viasat has a range of pay tv documentary and sports channels as well as the eight Viasat Film film channels. Acquisitions for the Nordic market are handled at the London office.

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TURNER NORDIC AND BALTIC

Turner Broadcasting System International operates versions of core TBS brands, including CNN, TNT, Cartoon Network and Turner Classic Movies, as well as country- and region-specific networks and businesses in Latin America, EMEA and the Asia Pacific region. It runs Pay- and Free-TV-channels, as well as Internet-based services and is a commercial partner with various third-party media ventures; it teams with Warner Bros. and HBO to leverage Time Warner's global reach. Currently, TBS operates more than 130 channels in more than 30 languages in some 200 countries around the world.

Turner Broadcasting System International, Inc. is a subsidiary of Turner Broadcasting System, Inc. (TBS), a Time Warner company.

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SWEDEN

HBO NORDIC

HBO Nordic was founded in 2012 and offers a subscription Video on Demand Service, directly to consumers in Sweden, Norway, Finland and Denmark. The channel also distributes brand new premieres from other major broadcasters as well as an exciting selection of movies from Hollywood, international film studios, local distributors and independent companies. HBO Nordic is owned by Home Box Office, Inc., a subsidiary of Time Warner Inc.

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SWEDEN

SWITZERLAND

Switzerland is a federation made up of 26 cantons and has four national languages: French, German, Italian and Romansch. This is reflected in the organisation of the audiovisual landscape, with French, German and Italian channels having a major presence on the Swiss market.

However, the different language markets are still dominated by the public channels. The public service broadcaster SRG SSR idée suisse provides through its seven operating units seven television channels (three in German, two in French and two in Italian) and seventeen radio stations.

On 29 May 2013, the Federal Council (the Swiss government) issued a message to the Parliament on the partial revision of the Radio and Television Broadcasting Act, providing for the public radio and television service to be financed in the future by an "appropriate and practical" licence fee. With some exceptions, all households and companies are to pay the new fee, which will replace the former licence and be slightly less expensive. The change in the system was welcomed by a majority at the consultation stage. The draft legislation also provides for more flexibility and for simplified procedures for granting concessions to private radio and television stations.

Switzerland has 13 private regional television channels. In December 2013, the regulator OFCOM published the results of a study carried out on public satisfaction with regard to the range of TV channels available. The SSR TV programmes appealed to 60% of those questioned, while just 50% of the public gave the regional TV channels a positive rating. Viewers' criticism mainly concerned the quality of programme production and the poor entertainment value. For almost all the criteria mentioned, the private TV channels were rated less favourably than the SSR radio and television stations and local private radio stations.

Source: European Audiovisual Observatory, Mavise database on TV and on-demand audiovisual services and companies in Europe.

RSI

RSI is part of the group SRG SSR, the Swiss public broadcaster. The Italian unit operates two channels: LA 1 and LA 2. LA 1 is a full service channel aimed at a broad audience. LA 2 is a complementary channel with a focus on sport. There are also children's programs and repeats of news programs from LA 1. The drama editorial line looks for strong and realistic fiction stories. RSI also participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions, both for cinema and television.

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RTS

RTS is the national French speaking language public service channel in Switzerland. It operates two channels. RTS 1 is a mainstream channel. The prime-time schedule showcases its major in-house productions. RTS 2 complements RTS 1 with sports coverage, documentaries, arts programming and a special strand for young people. RTS also participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions both for cinema and television.

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SRF

SRF is the German language public service channel in Switzerland and operates three television channels. SRF 1 – a high-quality schedule of news and current affairs, light entertainment and arts, with a large proportion of in-house productions – reflects the complex reality of life in culturally diverse Switzerland. SRF zwei gives heavy emphasis to sport, feature films and series. The schedule is aimed more at a younger audience. SRF info offers viewers time-shifted viewing with running repeats of the latest information-based formats - news, sport and the arts. SRF participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions both for cinema and television.

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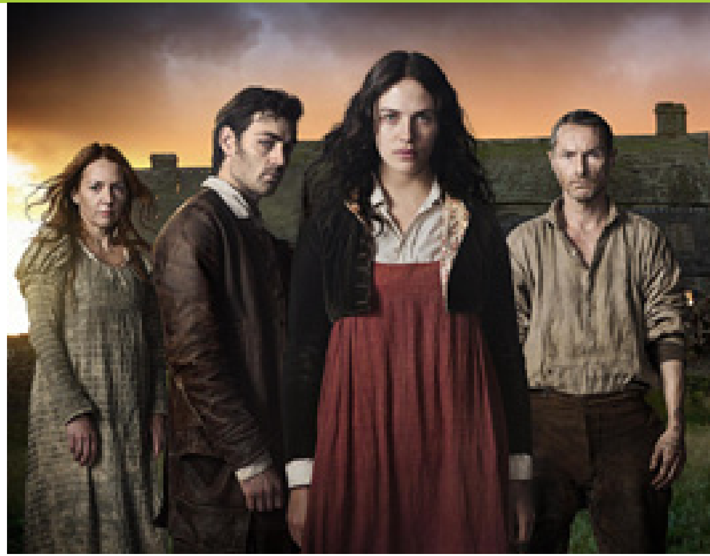
SWITZERLAND

Hinterland, 2014 – Production company: Fiction Factory



Jamaica Inn, 2014 – Production company: Origin Pictures

UNITED KINGDOM

The television market in the UK has undergone one of its most transformative periods in many years.

US media giant Viacom, which owns MTV and Nickelodeon, acquired free-to-air broadcaster Channel 5 for £450m in May 2014, giving it one of the most prestigious channel slots, while international factual broadcaster Discovery and cable giant Liberty teamed up to buy superindie producer All3Media, which makes series including Gogglebox and Midsomer Murders.

Meanwhile, ITV launched two channels, female skewing ITVBe and pay-TV network Encore, its first channel launches since 2006, Sony bought 16 ad-supported channels including True Drama and A+E Networks launched Lifetime.

ITV also recorded ratings growth during 2013 with gains of 3.1% thanks to hits such as Broadchurch and I'm A Celebrity, Get Me out Of Here.

Channel 4 has seen increased investment in international drama co-productions, appointing Simon Maxwell as Head of International Drama to commission a slate of high quality, ambitious drama co-productions that embody Channel 4's distinctive values and have international appeal.

Sky 1, which continues to commission big-budget drama as part of an annual £600m original programming commitment, saw a ratings rise of 4.3%, compared to a 10% decline the year before. However, BBC1 was down to a 21.1% share and Channel's share tumbled 11.4% to 5.8%.

The other main development over the last twelve months was the introduction of the high-end TV tax credit. The move, which meant that dramas with budgets over £1m qualified for a tax break, saw more than 40 TV productions with a total TV spend of almost £400m benefited. Shows such as Game of Thrones and 24: Live Another Day were among 13 international productions made in the UK, while a further 30 UK productions including BBC1's Atlantis, Call The Midwife and Sky's medical drama Critical qualified.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

BBC

The BBC is the largest broadcasting organisation in the world. Its mission is to enrich people's lives with programmes that inform, educate and entertain. It is a public service broadcaster, established by a Royal Charter and funded by the licence fee that is paid by UK households. The BBC uses the income from the licence fee to provide services including 8 national TV channels plus regional programming, 10 national radio stations, 40 local radio stations and an extensive website.BBC World Service broadcasts to the world on radio, on TV and online, providing news and information in 32 languages. It is funded by a government grant, not from the licence fee. The BBC also has a commercial arm, BBC Worldwide. Its profits are returned to the BBC for investment in new programming and services.

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BBC Cymru Wales (also known as English: BBC Wales or Welsh: BBC Cymru) is a division of the British Broadcasting Corporation for Wales. Based at Broadcasting House in the Llandaff area of Cardiff, it directly employs over 1200 people, and produces a broad range of television, radio and online services in both the Welsh and English languages. Outside London, BBC Wales is the largest BBC production centre in the United Kingdom, partly due to its additional slate of Welsh language programmes for BBC Radio Cymru and the Welsh language television channel S4C.

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BBC NORTHERN IRELAND

BBC Northern Ireland (Irish: BBC Thuaisceart Éireann / Ulster Scots: BBC Norlin Airlann) is the main public service broadcaster in Northern Ireland. The organisation is one of the three national regions of the BBC, together with BBC Scotland and BBC Wales. Based at Broadcasting House, Belfast, it provides television, radio, online and interactive television content. BBC Northern Ireland currently employs 700 people, largely in Belfast.

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BBC Scotland (Gaelic: BBC Alba) is a constituent part of the British Broadcasting Corporation, the publicly-funded broadcaster of the United Kingdom. It is, in effect, the national broadcaster for Scotland, having a considerable amount of autonomy from the BBC's London headquarters, and is run by the BBC Trust, who are advised in Scotland by the Audience Council Scotland. Its Scottish headquarters and studios are at BBC Pacific Quay on the south bank of the River Clyde, beside the STV headquarters and the Glasgow Science Centre.

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Channel 4 is a public service for information, education and entertainment. The Broadcasting Act 1990 requires that Channel 4 programmes shall: appeal to tastes and interests not generally catered for by ITV, encourage innovation and experiment, be distinctive, maintain a high general standard and a wide range, include a proportion which are educational, provide high quality news and current affairs, include proportions which are European and are supplied by independent producers.

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CHANNEL 5

Channel 5 launched as Britain's fifth public service channel in March 1997. It reaches 4 in 5 of the UK viewing public each month with a broad mix of popular content including Suspects, Big Brother and Neighbours. Sister channels 5*, 5USA and Spike complement Channel 5 with a mix of original commissions and acquired entertainment and U.S. drama, while Demand 5 is a free catch service available across multiple platforms and devices. In 2014, Channel 5 was the only major commercial free-to-air network to grow audience share across the most valuable TV audiences.

Since September 2014, Channel 5 has been owned by Viacom International Media Networks.

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ITV

ITV is the biggest commercial television network in the UK, broadcasting the most talked about television and making a major contribution to the UK's culture, economy and communities. The ITV Network is made up of 15 regional licences, providing television to viewers across the UK. 11 of the licences in England and Wales are owned by ITV Plc, formed in 2004 following the merger of Carlton and Granada. SMG owns the two Scottish licences, Scottish Television and Grampian; UTV and Channel Television own the licences for Northern Ireland and the Channel Islands respectively.

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SKY

Sky One is an entertainment channel (with sumulcast in HD). In addition to providing a television satellite service to subscribers (over 9.3 million households at the end of March 2011), BSKYB also has a portfolio of TV channels: Sky1, Sky Living, Sky Atlantic, Sky Arts 1 & Sky Arts 2, Sky 3D and Challenge.

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UKTV

UKTV is a major industry player and one of the most important and successful multi-channel providers in the UK. Formed in 1997, it is an independent commercial joint venture, between Scripps Networks Interactive, Inc. (SNI)and BBC Worldwide, the commercial arm of the BBC. Attracting over 42 million viewers each month, the network offers a broad range of quality programming across its entertainment, lifestyle and factual offerings - Watch, GOLD, Dave, Alibi, Eden, Drama Yesterday, Home, Really and Good Food. The success of UKTV is based on its programming including award-winning shows from the BBC and an increasing number of original commissions and acquisitions. The network embraces technology to deliver inspired channels to audiences through Freeview, Sky, Virgin Media, BT, TalkTalk, YouView and UKTV Play, and distributes its highly valued original programmes to 200 territories.

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S4C

S4C has a staturory obligation to broadcast to a majority of Welsh language output during peak viewing hours (1800 – 2200). The schedule provides a wide variety of popular TV – drama, entertainment, sports, music, news and current affairs, games and quizzes, youth and children's programming.

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